ENTERPRISE CHECKLIST · UTILITY EXPENSE MANAGEMENT

Utility Expense Management Pricing & Evaluation Checklist

A practical tool for understanding UEM costs, comparing provider scope, and evaluating total value

TELLENNIUM
Enterprise Expense Management
An Optric Company

Utility expense management quotes can look simple on the surface. A provider may price by account, meter, invoice, location, subscription, or another unit. But the quoted number does not tell you how much work is included, what stays with your internal team, or who owns billing issues through resolution.

Use this checklist to compare UEM proposals on the same basis. The goal is not to find the lowest unit price. It is to understand what each price includes, what can change it, and what the enterprise will still be responsible for after the agreement begins.

HOW TO USE THIS CHECKLIST

YES Clear, documented, and verifiable	**PARTIAL** Some information exists, but assumptions or responsibilities remain unclear	**NO** Undefined, excluded, or not yet demonstrated

FIRST, ESTABLISH YOUR PRICING CONTEXT

Account & Invoice Profile
Document your utility account or service-point count, invoice volume, billing frequency, and major utility categories.

Environment Complexity
Identify the number of utility providers, geographic footprint, exception volume, known billing issues, and current condition of account data.

Systems & Scope
List ERP/AP systems, integration needs, current provider or internal process, and the services you expect the UEM provider to perform.

UEM PRICING & EVALUATION AREAS

#	Area	Assessment Question	Yes	Partial	No
01	**Unit of Cost**	Is it clear what the provider means by account, meter, service point, invoice, or location, which unit drives the fee, and how pricing changes as volume changes?	☐	☐	☐
02	**Scope Behind the Price**	Is it documented which services are included, optional, separately priced, or retained by your internal team?	☐	☐	☐
03	**Implementation & Data Readiness**	Are data discovery, inventory cleanup, migration, historical reconciliation, onboarding, and other one-time requirements clearly defined and priced?	☐	☐	☐
04	**Integrations & Complexity**	Are standard versus custom integrations, reporting requirements, ERP/AP connections, and unusual billing complexity clearly addressed?	☐	☐	☐
05	**Dispute Ownership**	When an anomaly is found, does the provider identify, validate, submit, follow up, resolve, and verify the resulting correction or credit?	☐	☐	☐
06	**Bill Pay & Payment Responsibilities**	Is it clear whether Bill Pay is included, whether payment processing carries additional fees, and where approval responsibility remains with the enterprise?	☐	☐	☐
07	**Total Cost & Retained Work**	Does the comparison account for internal labor, late fees, billing leakage, manual follow-up, account maintenance, and other work that may remain with your team?	☐	☐	☐
08	**Value, Accountability & Proof**	Are service commitments, outcome measurement, references, and examples from enterprises of comparable scale and complexity available and clearly defined?	☐	☐	☐

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SCORING GUIDANCE

Mostly "Yes"

You have enough clarity to compare proposals on more than unit price.

PRIORITY ACTION

Run an apples-to-apples comparison. Apply the same account definitions, scope assumptions, implementation requirements, and responsibility standards to every provider.

Mostly "Partial"

The quoted prices may look comparable, but important assumptions are still unclear.

PRIORITY ACTION

Resolve the gaps before comparing costs. Put inclusions, exclusions, implementation work, dispute ownership, and retained internal responsibilities in writing.

Mostly "No"

The quoted number is not yet useful enough to support a defensible decision.

PRIORITY ACTION

Pause the price comparison. First define your environment, required scope, and division of responsibilities, then ask each provider to reframe its proposal against the same requirements.

THE FIVE-STEP UEM QUOTE EVALUATION SEQUENCE

1 Establish the Real Unit of Cost

Define exactly what the provider means by account, meter, service point, invoice, and location. Confirm which unit drives the fee and how pricing changes as volume increases or decreases.

2 Define the Scope Behind the Price

Document what is included, optional, separately priced, or left with your internal team. Do not compare unit prices until the scope is clear.

3 Identify Implementation and Complexity Costs

Clarify data cleanup, migration, integrations, historical reconciliation, custom reporting, and other one-time or variable costs. Make sure those costs are visible before evaluating the monthly fee.

4 Test Accountability for Outcomes

Ask what happens after a billing issue is identified. Does the provider only flag the problem, or does it carry the issue through validation, dispute, follow-up, correction, and verified credit?

5 Compare Total Value, Not Just Unit Price

Evaluate the provider fee alongside retained internal labor, avoided fees and penalties, billing leakage, recoveries, integration burden, service commitments, and measurable outcomes. Use the quoted price as one part of the decision, not the entire decision.

SUGGESTED NEXT STEP

Ask each provider to walk one realistic utility billing issue from identification through resolution. Use the same scenario for every provider. For example:

> **An incorrect tax or surcharge appears across multiple utility accounts.**

Ask the provider to explain:

- Who identifies the problem?
- Who validates it?
- Who contacts the utility?
- Who tracks the dispute?
- Who confirms the correction?
- Who verifies the credit?
- What work remains with your team?
- Is any part of that process separately priced?

The answer will often tell you more about the real value of the proposal than the per-account fee alone.

CLOSING INSIGHT

A UEM quote is only useful when the price, scope, responsibilities, and expected value are clear.

The strongest comparison looks beyond the unit cost and asks what work the provider actually owns, what remains with the enterprise, what can change the fee, and whether identified problems are carried through to a verified outcome.

Compare the operating model behind the price, not just the price itself.

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