Simplify the customer experience, streamline your workflow, and gain control of your data to deliver successful energy efficiency programs.

**Customer-Driven Automation**

Remove ambiguity and excuses about who’s responsible to take the next step for your customer’s projects. Unlike traditional CRMs, workflow built into Optix Manage makes it crystal clear who is assigned the next task and what is required of them. It organizes the data to make each task easier to complete. No more hunting around because someone didn’t know what fields to complete. And Optix Manage provides more out-of-the-box automation to ensure the workflow is easy to navigate. No one needs to know who to assign it to next, it just goes to the right place; like magic. After it’s done you’ll always be able to see and report on what happened.

**Real-Time Insight & Results**

Stop waiting for answers. With the real-time analytics, Optix Manage delivers insights on every project in your program. You’ll never wonder what’s going on with a customer’s project, contractor job, or rebate payout. Pre-built and ad hoc reports enable you to get the answers you need day or night. And gone are the days of making phone calls to your staff, implementers or contractors to answer customer questions. Optix Manage makes it easy to identify what is working, which trade allies are performing well, where projects get derailed and, ultimately, measure and improve program performance.

**Customer-First Design**

From initial engagement to program completion, EnergySavvy relentlessly focuses on the customer user experience. Our modern technology stack and highly intuitive user interfaces better engage program participants, thereby reducing frustration, minimizing mistakes, and avoiding drop out.

**Powerful Web Portals**

Optix Manage provides an easy partner web portal for contractors, auditors, retailers, lenders and others, so they can spend their time doing their jobs rather than fighting with unfriendly systems, paperwork and cumbersome approaches. Partners log in and act on your customer’s behalf without your intervention. Data entry and project updates, like recording installed measures, becomes a breeze with Optix Manage. And customers have their own project portal to access tailored project information so they know exactly what’s going on with their home or business at any moment.

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“EnergySavvy’s software gives us insight and control over our program performance by providing transparency and real-time quantification.”

- Gavin Hastings
  Arizona Public Service

**Proven Results**

- 50% Reduction in utility administrative time to review and approve projects
- 66% Reduction in data processing time for utility reporting
- 80% Reduction in implementer rebate processing labor costs
- 31% Reduction in contractor administrative time to submit projects
- 40% Faster time to completion of projects
- 6x Higher trade ally satisfaction
Streamlined Data Collection
Contractors typically deal with a lot of paper when working with utility energy efficiency programs. Reservation forms, bid forms, rebate forms – all with duplicate information requests – faxed in with no visibility into the processing status. Optix Manage revolutionizes the contractor experience. Program information is entered once, in a simple web interface, and partners can keep track of where their projects are as they proceed through the system.

Professional Integration
Take the pain out of spreadsheet uploads and automate your most expensive tasks. Optix Manage makes managing incentive payments, validation of user information, and many other system integrations easy. And HPXML integration with professional in-home audit tools will delight your trade allies. Spreadsheet-less data integration reduces errors and speeds up data collection. And, when spreadsheets are required, Optix makes transferring them between systems a breeze.

The Last Migration You’ll Ever Do
Optix Manage can be used by any staff hired internally or externally to run your programs, replacing the risk of data loss with each staffing change with the safety and consistency of having a system that survives beyond personnel changes. With Optix Manage as your system of record, you’ll never need to do another migration.

Up-to-the-minute analytics you can drill into provides insights on program performance.

Partner portal streamlines data entry to reduce data lag, increase accuracy, and delight contractors.

Schedule a Demo
Discover why leading utility energy efficiency departments use Optix Manage daily to engage customers, track data and optimize operations: www.energysavvy.com/manage

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