



SAVING ENERGY AND MONEY STATEWIDE WITH BETTER INTELLIGENCE AND GREATER CONFIDENCE



Focus on Energy is Wisconsin utilities' statewide energy efficiency and renewable resource program. Since 2001, the program has worked with eligible Wisconsin residents and businesses to install cost-effective energy efficiency and renewable energy projects.

Focus on Energy rewards eligible Wisconsin residents and businesses for installing cost-effective, energy-efficient products and for pursuing renewable energy projects. Information, resources, and financial incentives are offered to help implement energy-saving projects that otherwise would not be completed or to help complete projects sooner than scheduled. These energy projects:

- Help Wisconsin residents and businesses manage rising energy costs.
- Promote in-state economic development.
- Protect our environment.
- Control Wisconsin's growing demand for electricity and natural gas.

Situation

Focus on Energy was launched in 2001, with all data management and processing handled exclusively by contractors on contractor-owned systems.

What's more, financial incentive approvals were performed via email with no consistent methodology or audit trail. Without adequate restrictions and audit capabilities to ensure criteria were met before data could be accepted, the potential for inaccuracy, duplication, and even fraudulent activity became a recognized reality.

This posed a substantial risk and was especially problematic considering the significant amount of funds the program distributes to Wisconsin residents and businesses each year—and the \$100 million budget the organization manages.

In 2005, a custom application was developed to house all the data vital to administering

the program. The goal of the project was to:

- Remove the risk associated with contractor-owned systems.
- Improve internal controls.
- Improve data quality.

While the project achieved some success, it became apparent that the size, complexity, and increasing needs of the program made the custom applications too expensive and labor intensive to operate in the long term.

Focus on Energy recognized the need to manage data coming into its platform by creating safeguards, as well as its need to organize all the resources and processes making up the Focus on Energy program. Focus on Energy contracted with Wipfli to help identify and implement a solution that would address its data management and organizational needs.

“Wipfli has been instrumental in telling us what's out there in terms of new technology and relevant services. But I'd say one of the biggest assets has also been their pointing out paths that we shouldn't go down.”

- Greg Laubmeier, Finance and Operations Manager, Focus on Energy

Strategy

Embracing a long-term commitment, Wipfli embarked on a true partnership with Focus on Energy. The organization recognized the ultimate goal of doing what is best for the state's environment, residents, and businesses.

After gaining a solid understanding of Focus on Energy's business requirements, Wipfli presented a demonstration of what Microsoft Dynamics® 365 (Customer Relationship Management [CRM]) solution could do using the organization's own data. Wipfli then helped the organization focus the project's scope.

The firm immersed itself in the industry to learn all it could while pursuing a

six-month turnaround for launching the entire technology solution. By applying agile methodology, Wipfli was able to initiate and conduct numerous implementation activities involving designing, building, and testing—all through an iterative process. Data migration also occurred, along with a significant amount of cleanup.

In addition to shoring up the database and introducing standards, Wipfli further integrated the solution with the organization's instance of Microsoft Great Plains (financial system) and introduced the QlikSense Business Intelligence (BI) platform.

Among the overall capabilities introduced were:

- Issuing timely and accurate incentive checks twice monthly.
- Generating reports out of the database easily.
- Granting access to all the various external users via Web browser.
- Ensuring the accessibility of key workflow items.
- Integrating with email.
- Generating notifications for key events in the system.

“One of the biggest pluses of working with Wipfli has been the ability to draw from their vast pool of resources and have access to a broad range of talent. That and also having the same project manager on our project since day one and for the past five years.”

- Greg Laubmeier, Finance and Operations Manager, Focus on Energy

Benefits

Today, through the use of CRM, Focus on Energy has reduced risk exposure and improved internal controls for its energy savings projects. These Focus on Energy projects have provided benefits of over \$500 million annually to residents and businesses throughout Wisconsin.

- The centralization of accounts and energy savings data is resulting in tremendous efficiencies, monetary savings, and reporting accuracy for the program.
- In 2016, every dollar invested in Focus on Energy projects yielded \$3.00 in benefits to the state of Wisconsin. In addition, the program saved 9.4 billion kilowatt hours. Those savings equate to the power needed to run all the lights in Times Square for 156 years.

- Basic and advanced reporting abilities have simplified tracking of energy savings goals and streamlined reporting within the Focus on Energy program. Prior to the CRM deployment, seven different databases were utilized, each with its own interface and unique data fields.
- Advanced reporting and consolidation now allow for accurate measurement of incentives paid—payments that equal over \$55 million in incentives annually to state residents for participating in the Focus on Energy program.

CRM deployment has greatly reduced risk exposure and resulted in dramatically improved internal controls. Today there is complete accountability (date, time, user, etc.) for application approvals and incentive payments. A single application can range from \$50 to \$250,000.

Now Focus on Energy can quickly trace back to any decision made and ensure funds are distributed appropriately. By leveraging the best of CRM and BI, the organization has raised its confidence levels and the confidence the public and utility members place in it.



Learn more about how Wipfli LLP can help your organization:

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