

Trade Ally Network Reference Guide



Welcome to the Trade Ally Network!

Thank you for joining our Business Energy Efficiency Program as a Trade Ally. Your partnership is key to building a more sustainable future for Michigan. That's why we've created this resource to get you started.

Read on for more details on how we can work together to help your business and your customers thrive.

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***“Becoming a Trade Ally was a game changer
for my business and my customers”***

- Trade Ally

Program Overview

Trade Ally Network Benefits

Participating in the Consumers Energy Trade Ally Network gives your company a competitive edge by providing increased visibility, sales opportunities and financial benefits through energy efficiency projects.

Benefits include:

- No cost to participate in the program
- Financial incentives for your customers and your business
- Convenient online portal for applications and incentive payments
- Access to free co-marketing and promotional materials
- Dedicated support for projects and program details
- Public listing in the “Find a Contractor” tool on the Consumers Energy website

Getting Started

Here are a few important things to know as you get started:

- Annual rollout events are held in November to announce any changes before the new program year begins
- Each program year runs from December 1 - November 30
- Submit applications by November 30 to secure rebates for that year
- Both digital and PDF applications are provided to submit your projects for rebates

Online Resources

Register at the [Trade Ally Portal](#) and visit it often for important updates, including:

- The monthly Trade Ally Newsletter
- [Training](#) on completing and submitting an application
- [Case studies](#), [brochures](#), [flyers](#) and [co-marketing materials](#) for download
- Additional program [training and webinar recordings](#)
- [Policies and Procedures Manual](#)

These resources are also accessible through the QR codes found at the end of this guide.

Have questions? Visit [ConsumersEnergy.com/BusinessTradeAlly](https://www.consumersenergy.com/BusinessTradeAlly), call us at **866-674-2770** or email BusinessTradeAlly@cmsenergy.com.

Contact Information

Account Managers are available to support you. Reach out to the manager in your area for answers to questions about the program, procedural or payment updates, or help completing incentive applications.

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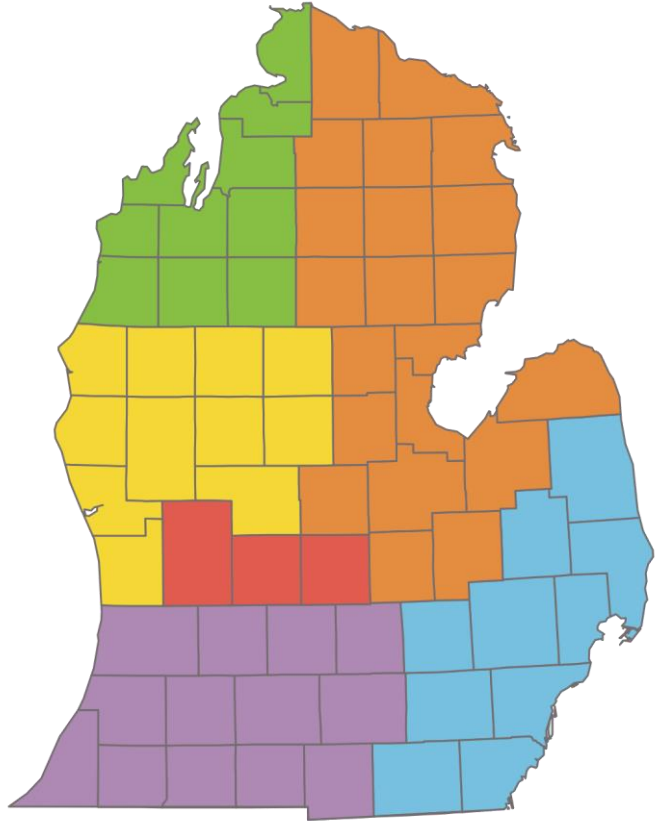
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Scan the QR code on page 14 for contact map information.

Additional Contacts

Trade Ally Program – General Questions

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Brian Birckelbaw: Regional Account Team Manager
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Project Status

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Midstream Distributor Account Managers

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Not sure who to contact? Call us at **866-674-2770** or email [**BusinessTradeAlly@cmsenergy.com**](mailto:BusinessTradeAlly@cmsenergy.com) for help.

Program Incentives

A variety of incentives are available to help business owners reduce the initial cost of energy efficiency measures. These include:

Instant Discounts

Through the Business Instant Discount Program, contractors can purchase approved energy efficient products at a discounted price direct from a participating distributor. The distributor applies a price reduction at the time of sale, with no need for an application or waiting to receive a rebate check.

Prescriptive Incentives

These incentives are available for implementing common energy efficiency measures installed in a retrofit or equipment replacement project.

Payments are based on quantity, size and/or the efficiency of the equipment.

Custom Incentives

These incentives are available for less common or more complex measures that are not eligible for a prescriptive incentive.

Payments are based on the project's first-year energy savings (kWh or Mcf).

Eligibility for incentives is within the sole discretion of Consumers Energy.

Incentives are available for more than **450 products across categories like:**

- Lighting and lighting controls
- Variable frequency drives
- Compressed air
- Manufacturing
- HVAC equipment
- Refrigeration
- Laundry
- Kitchen
- Pipe and ductwork insulation
- Agriculture

Scan the QR code on page 14
or click to find the complete [Incentive Guide](#).

The Application Process

The incentive application process is completed in five steps.

Submit Pre-Notification and Final Applications by email:

BusinessEnergyEfficiency@cmsenergy.com

- ① **Check Project and Equipment Eligibility**
All installed equipment must meet or exceed specifications described in the Incentive Catalog available on the portal under "Program Resources".
- ② **Submit Pre-Notification Application**
Pre-Notification Applications are required for some projects and recommended for projects requesting incentives exceeding \$10,000. You will receive a reservation letter to share with your customer that confirms the incentives are reserved for the project. Keep your Pre-Notification Application for your Final Application.
- ③ **Install Equipment and/or Complete Project**
You have a total of 90 days (retrofit) or 18 months (new construction) to install equipment and/or complete your project and submit your Final Application. Contact the program team if your project will take longer.
- ④ **Submit a Final Application**
You must submit your Final Application within 60 days of the completion date, or on or before the reservation expiration date, whichever occurs first. Attach the following (incomplete applications will be rejected):

 1. Completed applicant information, customer signature, and payment release, if appropriate
 2. Supporting documentation (see Incentive Catalog for details)
 3. Dated and itemized invoices listing the model number, manufacturer, unit price and quantity of the installed equipment
 4. Scope of work depicting the type and quantity of installed equipment (as necessary)
 5. Specification sheets for installed equipment, if different from previously submitted
 6. Business energy efficiency measure worksheets for incentives requested
 7. Copy of payee's W-9
- ⑤ **Receive Incentive Payment**
When Final Application is approved, an incentive check will be mailed to you or your designee. Checks are typically mailed within 6-8 weeks.

Scan the QR code on page 14
or click to access the [Incentive Catalog](#).

Application Checklist

Use this checklist to plan ahead for documents and information required throughout the application submission process.

Pre-Application

Application Information

- Consumers Energy account information
- The account number and installation address
- The fuel type(s) align with the measure(s) being applied for
- Company name
- If the estimated completion date is more than 90 days, additional project details are provided for long-term reservation

Measure Information

- Measures have been double-checked for accuracy (e.g. appropriate measures selected, default wattage, counts, etc.)
- Measure requirements in the Incentive Catalog have been reviewed and verified. All applicable documentation is included

Specification Sheets Included

- Full model numbers are indicated
- All equipment meets the technical requirements for their respective measures

Final Application

- An explanation if a pre-application was not submitted and an exception is needed
- Authorized signature provided by customer
- Third-party payment release signature (if applicable)
- Project costs match invoice(s)
- Itemized list of specific equipment, including model number, manufacturer, price and quantity
- Payee's form W9 included (this form is required for each individual application submitted)

All applications must be submitted separately. No more than one application per email. By submitting this form, you acknowledge that the information provided is accurate and meets criteria outlined.

Measure Information

- Measures have been double-checked for accuracy (e.g. appropriate measures selected, default wattage, counts, etc.)

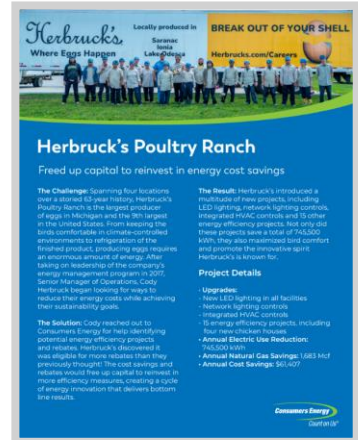
Scan the QR code on page 14
for a copy of the **Application Checklist**.

Marketing Support

Consumers Energy offers free marketing support to help you promote your participation in the Trade Ally Network.

Industry-Specific Marketing Materials

Industry-specific flyers, brochures and case studies can help show your customers the value of efficiency upgrades.



Co-Marketing Materials

Order co-marketing materials to let your customers know you've been recognized as a preferred partner with Consumers Energy.



"It's one thing to say you work with Consumers Energy, quite another to have a joint logo email or digital ad stating so."

- Trade Ally

See page 14 for Marketing QR Codes.

Rewards & Bonuses

On top of incentives for customers, the Trade Ally Network offers Trade Allies incentives for completing energy efficiency projects. Check the portal and sign up for the Trade Ally Newsletter to get the latest information on what your business might qualify for.

Rewards

By completing projects with the program, you can earn and redeem points for a large assortment of items like TVs, furniture, iPads, sporting goods and more.

How it works:

- Earning points is automatic when you put your name and email in an application and it gets paid.
- The program runs from January 1 to December 31. All points expire on February 28 of the following year and cannot be rolled over.
- Visit the TA Portal to access the rewards website, view your point balance and redeem your points before the deadline.
- Business Instant Discount Distributors and Small Business Trade Allies are also eligible.
- If your business participates in all of these programs, you can earn rewards points for each paid transaction.

Bonuses

A bonus may be offered during the program year to provide extra motivation to apply and complete eligible projects. If a bonus is offered, it will be announced in the Trade Ally Newsletter.

Scan the QR code on page 14
or click for details about the [**Rewards Program**](#).

Additional Program Opportunities

Explore these additional programs for ways to earn even more benefits and incentives as a Trade Ally.

Become a Preferred Distributor

As a [Consumers Energy Business Instant Discount Distributor](#), you can tap into today's growing demand for energy efficient products and services. Distributors are essential in helping our customers obtain instant money-saving discounts to improve their energy efficiency. Benefits of being a Preferred Distributor include:

- A competitive advantage from offering exclusive discounts
- Online tools that include easy customer lookup and eligibility features
- A wide variety of eligible products that serve a range of industries
- Ongoing program support and resources to help your business

Small Business Trade Ally Network

As a counterpart to our Large Business Trade Ally Network, the [Small Business Trade Ally Network](#) offers our partners slightly different opportunities:

- Incentivizes lighting and refrigeration measures
- Often yields higher incentives than the large business program
- Pays the Trade Ally directly for the project, not the customer
- Designed for the customers who often need the incentives most

Multifamily Program

Our [Multifamily Program](#) offers Trade Allies incentives for installing energy efficient equipment in multifamily buildings. Details can be found in the Multifamily Program Catalog.

Michigan Saves

[Michigan Saves](#) (MichiganSaves.org) is a nonprofit green bank that supports clean energy improvements. Join their network as a Michigan Saves authorized contractor and get exclusive rights to offer custom energy financing solutions to both residential and commercial customers.

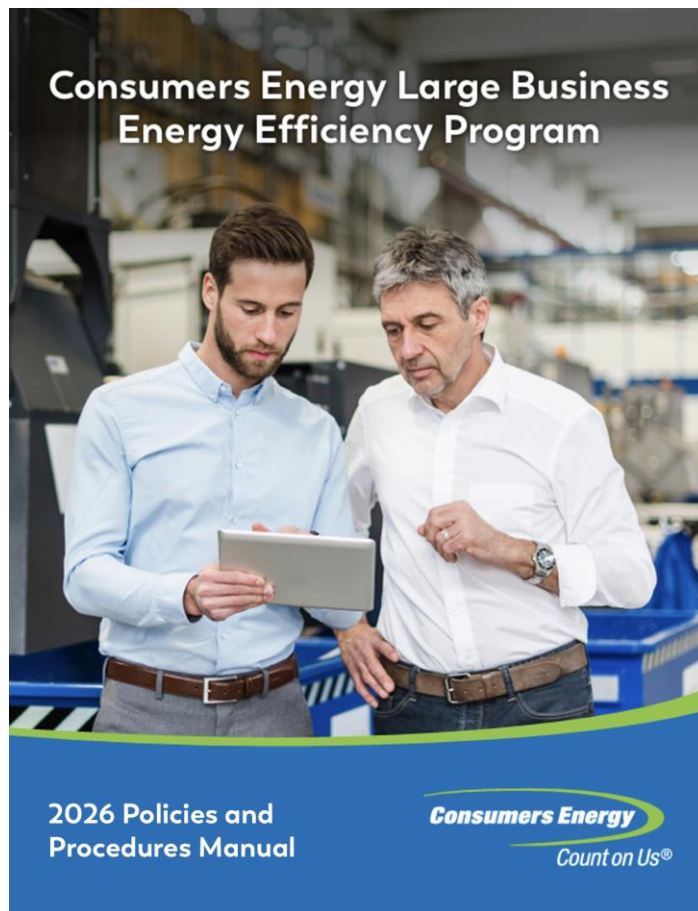
See page 14 for Program QR Codes.

Policies & Procedures

We're excited to help your business succeed in the Trade Ally Network. To bring your customers the best value and make the most of your benefits and rewards, please take the time to familiarize yourself with our Policies and Procedures Manual.

If you have any questions, please reach out at **866-674-2770** or email BusinessTradeAlly@cmsenergy.com. Our team is always ready to offer support.

Thank you again for your partnership. We look forward to making Michigan more efficient, together!



Scan the QR code on page 14
for a copy of the **Policies and Procedures Guide**.

QR Codes for Program Details

Program Resources

Territory Map



Contact Map



Incentive Catalog



Incentive Application



Policies & Procedures



Application Checklist



Marketing Resources

Marketing Materials



Flyers & Brochures



Case Studies



Rewards Program



Additional Programs

Michigan Saves Program



Small Business Trade Ally Program



Distributor Program



Multifamily Program

