

A person wearing a blue long-sleeved shirt is sitting on a couch, using a silver laptop. The laptop screen displays the Ameren website. The background is a blurred living room setting.

**AMEREN ILLINOIS ENERGY EFFICIENCY PROGRAM**  
**PY2023 Smart Savers Initiative**  
**Program Ally Kickoff**

# Agenda



- Transition & Contacts
- Initiative Goal & Design
- Customer Journey & Leads
- Expectations & Requirements for Program Allies
- Installer Guidance & Resources
- Program Ally Marketing Support

Team contact information is below:

For any questions, your first contact for support needs, inventory needs, customer concerns and customer cancellations, please do not hesitate to call, text or email.

**Jennifer “Jen” Michael**

Smart Savers and Multifamily Initiatives Manager, Leidos Inc

1.309.241.3584 (Cell)

[jmichael@ameren.com](mailto:jmichael@ameren.com)



Secondary support – your **Field Energy Specialist** can also answer many questions and if not, they will work to get answers or remove barriers for you.

# Program Contacts

## Field Energy Specialists:

1. Tucker Blum  
[tblum@ameren.com](mailto:tblum@ameren.com)  
1.309.857.9773
2. Tim Huber  
[thuber@ameren.com](mailto:thuber@ameren.com)  
1.314.302.2919
3. Justin Shearer  
[jshearer@ameren.com](mailto:jshearer@ameren.com)  
1.309.509.8207
4. John Wilson  
[jwilson3@ameren.com](mailto:jwilson3@ameren.com)  
1.618.980.1272
5. Matt Flowers  
[mflowers5@ameren.com](mailto:mflowers5@ameren.com)  
1.217.821.1111



A white rectangular box with a thin border containing the text "SMART SAVERS INITIATIVE" in a bold, white, sans-serif font. The box is centered over the image of hands typing on a laptop.

**SMART SAVERS  
INITIATIVE**

# Ameren Illinois Smart Savers Initiative Primary Goal



## Purpose:

This initiative was designed to assist eligible low-income Ameren Illinois customers in **reducing** their energy consumption by removing barriers to their access of smart thermostat technology.

Additionally, Ameren Illinois wants to support Program Allies in **growing** their businesses and creating an opportunity to **retain trained installers** throughout the year.



## Recruitment

- Ease of enrollment pathway.
- Encourage Program Ally customer recruitment and Multifamily property referrals.

## Installation

- Self-install includes energy efficiency educational materials.
- Direct install: trained and qualified Program Allies provide in-home set-up and provide direct education of use.
- Both pathways provide information to access other initiatives.

## Post-Installation

- 10% direct QA/QC validation thru surveys/calls.
- Customer satisfaction online surveys to assess customer experience.
- Feedback to Program Allies from surveys.

# Smart Savers Initiative Design

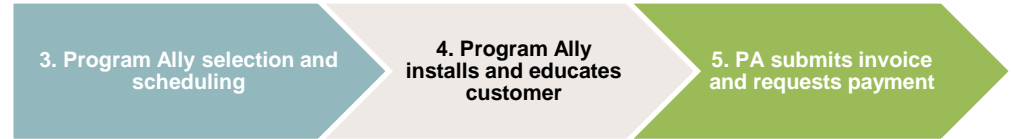


Single-Family  
(portal submission)

## SELF-INSTALL CUSTOMER JOURNEY



## DIRECT INSTALL CUSTOMER JOURNEY



Multifamily (Program Ally or Program referred)



\*Non-qualifying customers will be redirected to the Ameren Illinois Smart Thermostat Marketplace Initiative and the primary Ameren Illinois Energy Efficiency site for more energy savings opportunities.



# Smart Savers Initiative Design



## Installation Rates and Inventory Information

| Type of Installation | Installation Rates | Callback Rates |
|----------------------|--------------------|----------------|
| Single Family        | \$175              | \$175          |
| Multifamily          | \$125              | \$125          |

### Thermostats Provided by Program

Google Nest E and ecobee3 lite

### Other Supplies provided by Program

Wiring Adapters, Stat Hangers and Customer Leave Behind Materials

### Marketing Materials provided by the Program

Door Hangers, Flyers, Co-branded Collateral

# Smart Savers Inventory Process



## Replenishment and Initial Inventory Stock

| Type of Thermostat | Single Family Orders | Multifamily Orders |
|--------------------|----------------------|--------------------|
| Google Nest E      | 55%                  | 25%                |
| ecobee3 Lite       | 45%                  | 75%                |

### Initial Inventory

Provided at one to two weeks of Program Ally's stated capacity level.

### Inventory Replenishment

Smart Thermostats will be replenished one-for-one based on invoicing from your company. Stock will be shipped directly to your location. If more are needed, contact Program Staff.

### Multifamily Projects

Jen will coordinate with you as to the type and number of stats required for each MF installation. Please provide a **7-10 day** lead for projects greater than your normal capacity.

- Program Allies are **financially responsible** to ensure the security of Program provided products.
- An inventory count register will be requested **at the end of each month**.
- Storage of Smart Thermostats should be in a **climate-controlled location to optimize battery life**. During freezing weather, thermostats **should not be left in vehicles**.
- It is recommended that product is **rotated** and used on a "**First In, First Out**" basis to ensure factory charge of internal battery is at its strongest for installation.

A close-up photograph of a man with short dark hair and a light beard, wearing a dark blue V-neck sweater over a grey t-shirt. He is looking down at a white smartphone held in his right hand. The background is a bright window with a grid pattern, slightly out of focus.

**DIRECT INSTALL  
CUSTOMER JOURNEY**

# Customer Enrollment – Program Ally Selection



[AmerenIllinoisSavings.com/SmartSavers](https://AmerenIllinoisSavings.com/SmartSavers)

If the customer has a qualifying account and chooses professional installation, they will see a list of enrolled Program Allies who have capacity in that zip code.



ENERGY EFFICIENCY PROGRAM

Thank you for visiting the Ameren Illinois Energy Efficiency Program **Smart Saver** Portal

Qualifying residential customers with an active Ameren Illinois account, and who have not previously received a Smart Thermostat can apply below.



Now your new thermostat

\* Thermostat Installation Method

Professional Installation

\* Select Program Ally Below. If no Program Ally is selected one will be chosen for you.

--None--

--None--  
BURNSIDE BRO'S CONSTRUCTION  
MEYER CLIMATE CONTROL  
FRITCH HEATING & COOLING  
MINORITY ELECTRIC INC.  
LEACH & COMPANY INC

# Customer Enrollment – Program Ally Selection



[AmerenIllinoisSavings.com/SmartSavers](https://AmerenIllinoisSavings.com/SmartSavers)

The customer will receive an email with the name of the Program Ally.

To promote a great customer experience, make first contact attempt no later than 10 business days from receiving the lead email.

Leads that you do not have time to contact need to be communicated back to the Program Team.



Dear Recipient,

**Congratulations!**

You have successfully enrolled to have a Smart Thermostat installed in your home.

Your order number is: **AMIL0001067420**

**ENERGY STARS HEATING & COOLING CO** will reach out within **10 business days**

If you have any questions regarding installation of your smart thermostat, please visit [here](#) .

If you do not receive a callback within this timeframe, please call 1.866.838.6918 and let us know.

Sincerely,

The Ameren Illinois Energy Efficiency Program





**MANAGING NEW AND EXISTING  
INSTALLATION LEADS**

# Customer Appointment Scheduling



- After receiving the customer information, the Program Ally has 10 business days to contact the customer to schedule the smart thermostat install.
  - If the customer does not return any calls after 2 attempts (allowing the customer 1 day to return your call after each attempt), make a final call informing the customer of the last attempt to contact. If no contact is made, update applicant lead status to “Unreachable”.
  - The customer will be un-enrolled; and in hopes of future participation, communication encouraging future re-enrollment will be sent.
- Installation appointments should be given in time windows if possible.
  - 2 or 4-hour blocks are preferred, (ie: 8am-12pm, 1pm-5 pm, 2pm-6pm, etc).
- Update the status of your customer leads in your Amplify portal each day.
- All leads should be updated by the end of the day on Fridays.

# Installation Appointment Scheduling (cont.)



- Appointment reminder calls are encouraged 1-2 business days prior to the install appointment.
- During this reminder call:
  - Program Ally representative to confirm that the customer and other occupants of the home have not:
    - Tested positive, have current illness or been exposed to COVID-19 within 14 days.
  - Remind customer that an adult (18+ yrs of age) must be present during install appointment.
  - Remind the customer to have Wi-Fi log in information readily available (if customer has Wi-Fi).



A utility worker wearing a yellow hard hat with the Ameren logo, safety glasses, a blue shirt, and a high-visibility yellow vest is crouching on a bed of gravel. He is working on a grey electrical meter mounted on a red brick wall. A white pipe and a black cap are also visible on the wall. The background shows a grassy area and some bare trees.

## EXPECTATIONS AND REQUIREMENTS FOR PROGRAM ALLIES

## What Does the Ameren Illinois Smart Savers Program Expect From Program Allies?



- Company Principle completes this training session.
- Company Principles are responsible to ensure all current and future company installers:
  - Are fully trained to install and troubleshoot Smart Savers thermostats.
  - Are trained to assess equipment compatibility and when to use wiring adapters.
  - Understand how to educate customers on basic smart thermostat functionality.
  - Understand and are accountable to program requirements and expectations.
- Installers will always observe and comply with the Ameren Illinois Program Ally Code of Conduct and Initiative Terms & Conditions.

Smart Thermostats installed through this initiative **cannot** replace an operable smart thermostat already on site.

A person in a blue business suit is sitting at a desk, typing on a silver laptop. The scene is brightly lit, likely from a window, creating a professional and focused atmosphere. In the background, there is a pen holder with several pens and a white coffee cup on a saucer.


**RECEIVING INSTALLATION LEADS  
FROM THE PROGRAM**


# Access to Amplify

Monday Morning, you will receive an email with a link to create a password to access the Energy Efficiency Portal.

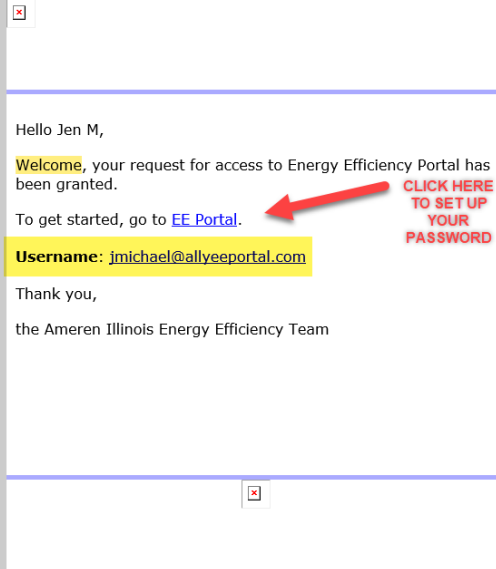
This will be where you and your team will be able to view, manage and report on your Smart Savers leads.

[EXTERNAL] Welcome to Energy Efficiency Portal

 Ameren Illinois Energy Efficiency Program <eefiles@ameren.com>  
To: Michael, Jennifer

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

**EXTERNAL SENDER STOP.THINK.QUESTION.**  
Verify unexpected requests before opening links or attachments.



Hello Jen M,

Welcome, your request for access to Energy Efficiency Portal has been granted.

To get started, go to [EE Portal](#).

**Username:** j michael@allyeeportal.com

Thank you,  
the Ameren Illinois Energy Efficiency Team


CLICK HERE TO SET UP YOUR PASSWORD

# Setting your password on the EE Ally Portal



Welcome, please enter your username and password.

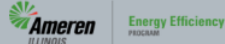
**Log in**

Forgot Password?  Hover your mouse below the Log In Bar and click "Forgot Password?"

If you forgot your password use the Forgot Password Link above.

If this is a first visit you will have received an email to setup your password, you must do that first. If you did not receive or the link expired please contact [leidoseeit@leidos.com](mailto:leidoseeit@leidos.com) with your username.


If you are a Community Partner, a Program Ally, or a Subcontractor of the program you may reach out to your program contact for access.



## Forgot Your Password

To reset your password, enter your username.


Username



## Check Your Email

We've sent you an email with a link to finish resetting your password.

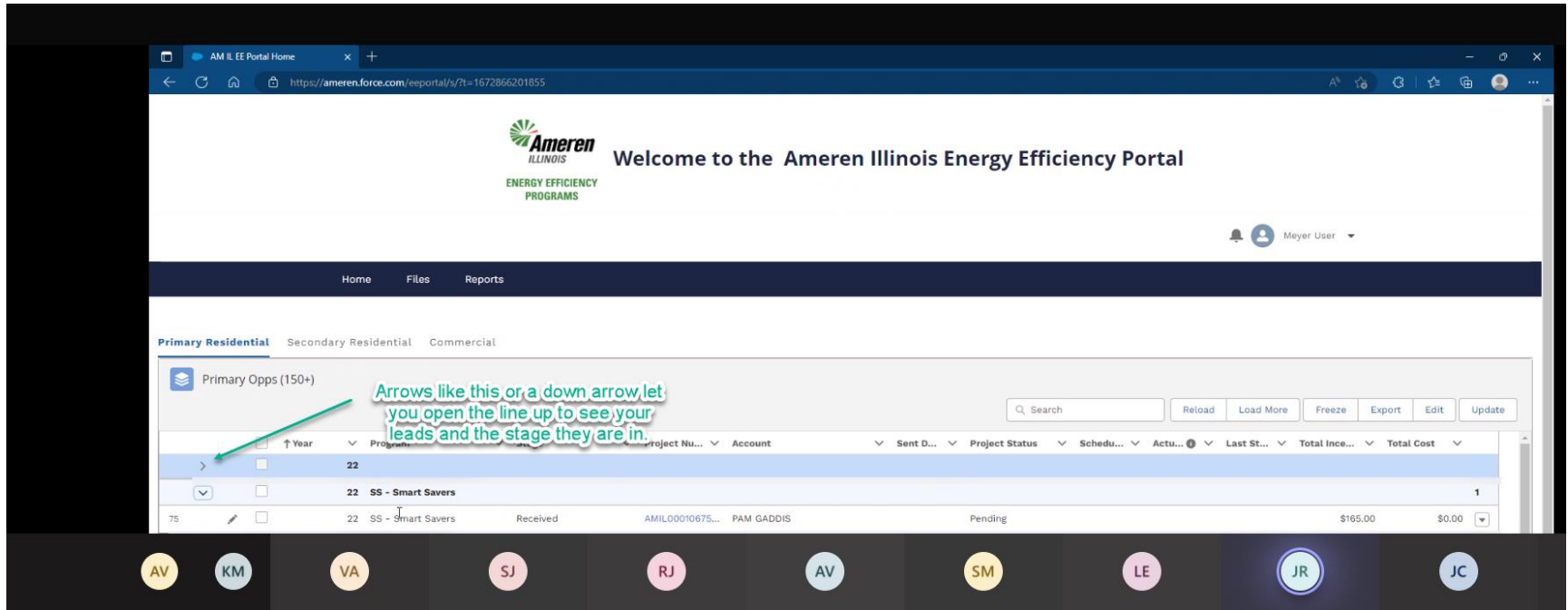
Can't find the email? Try checking your spam folder.

If you still can't log in, have us [resend the email](#) or contact your administrator. 

**Return to Login**

# Accessing your Customer Leads

Once logged in, you will be able to view the list of all of your active and completed Smart Savers leads. Use the arrows to open up sections.



The screenshot displays the Ameren Illinois Energy Efficiency Portal. The page title is "Welcome to the Ameren Illinois Energy Efficiency Portal". The user is logged in as "Meyer User". The navigation menu includes "Home", "Files", and "Reports". The main content area shows "Primary Residential" opportunities. A table lists "Primary Opps (150+)". A green arrow points to a right-pointing arrow icon in the first column of a table row, with a text box explaining that such arrows are used to open up sections.

Arrows like this, or a down arrow, let you open the line up to see your leads and the stage they are in.

| Year | Program              | Project Nu... | Account         | Sent D...  | Project Status | Schedu... | Actu... | Last St... | Total Ince... | Total Cost |
|------|----------------------|---------------|-----------------|------------|----------------|-----------|---------|------------|---------------|------------|
| 22   | SS - Smart Savers    |               |                 |            |                |           |         |            |               | 1          |
| 75   | 22 SS - Smart Savers | Received      | AMIL00010675... | PAM GADDIS | Pending        |           |         |            | \$165.00      | \$0.00     |

# Accessing your Customer Leads



Training video will go over the functionality and how to sort and update:

- Lead Stage (status).
- Entering scheduled installation appointment times.
- Log contact information (left a vm, unreachable, cancelled).
- Completed appointments.

Monday Morning by email, you will have a step-by-step quick reference guide, plus the video to help you with using the EE Ally Portal.

Please do not hesitate to reach out to Jen by email if you have any questions or issues with your log in or access. [jmichael@ameren.com](mailto:jmichael@ameren.com)

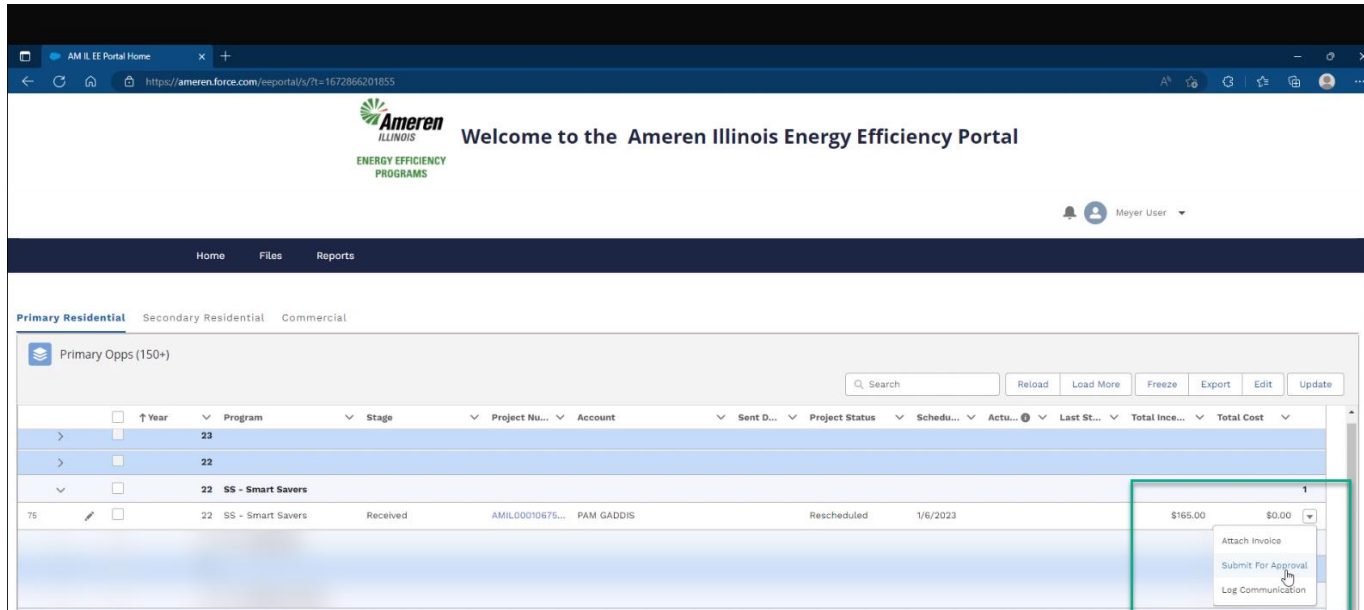
## Scheduling, Rescheduling, Cancellations, No-Shows, Completions and Failed Installations

- When contacting a customer attempting to schedule an installation appointment, contact the customer up to three times to schedule their appointment (preferably during different times of the day).
- For Unreachable customers - once you have contacted the customer three times (within the two weeks post lead) and have not been able to schedule an appointment, please update the Customer Lead to "**unreachable**".
  - After setting to unreachable, the Customer will receive an email notifying them to sign up for the Program again at a more convenient time.
- For appointment **cancellations**, Program Ally should provide at least two attempts at rescheduling over the 10 business days after the initial appointment date.
  - After 10 days, please update the status in the lead to either **scheduled, cancelled or unreachable**
- For **no-shows**, allow one attempt at rescheduling after the initial appointment. Update Lead status.
  - Program Ally is not compensated for no-shows or cancelled appointments (reminder calls can reduce no-shows).
- In the event of a **failed installation** - Program Ally needs to add detailed comments to the lead.
  - Installation attempt may not be compensated if detailed comments as to why it was not successful are not provided
- Once an installation or callback has been completed, the stage should be set to **Complete**.



# Invoicing your Customer Leads

Training video will inform on functionality, updating leads, attaching invoices, and submitting for approval/payment.



The screenshot displays the Ameren Illinois Energy Efficiency Portal. The page title is "Welcome to the Ameren Illinois Energy Efficiency Portal". The user is logged in as "Meyer User". The main content area shows a table of "Primary Opps (150+)". The table has columns for Year, Program, Stage, Project Number, Account, Sent Date, Project Status, Scheduled Date, Actual Date, Last Status, Total Income, and Total Cost. A context menu is open over a row with the following data:

| Year | Program           | Stage             | Project Nu... | Account         | Sent D...  | Project Status | Schedu... | Actu... | Last St... | Total Ince... | Total Cost |
|------|-------------------|-------------------|---------------|-----------------|------------|----------------|-----------|---------|------------|---------------|------------|
| 23   |                   |                   |               |                 |            |                |           |         |            | \$165.00      | \$0.00     |
| 22   |                   |                   |               |                 |            |                |           |         |            |               |            |
| 22   | SS - Smart Savers |                   |               |                 |            |                |           |         |            |               |            |
| 75   | 22                | SS - Smart Savers | Received      | AMILD0010675... | PAM GADDIS | Rescheduled    | 1/6/2023  |         |            |               |            |

The context menu options are: Attach Invoice, Submit For Approval, and Log Communication. The "Submit For Approval" option is highlighted by the mouse cursor.

Note: you **cannot Submit for Approval** without attaching an invoice.



INSTALLER GUIDANCE AND RESOURCES

# Installation Appointment Requirements



It is important that everyone working within the Program to represent Ameren Illinois well; utilizing courtesy, great communication while striving to create a great customer experience.

## Program Allies are required to:

- Wear a protective mask, if requested by customer.
- Confirm that pets are secured and there is an adult present prior to entering customer's residence.
- Acquire furnace serial number and validate chosen smart thermostat compatibility.
- Wear shoe covers or bring a separate pair of clean shoes to change into.
- Ensure the heating/cooling system is powered down before removing old thermostat.
- Always show respect for the customer's home and clean up all trash or debris.

**Encourage** team members to **exceed** — rather than just meet — **expectations.**

# Training your Installers

[AmerenIllinoisSavings.com/SmartHelp](https://AmerenIllinoisSavings.com/SmartHelp)

Your staff can view installation videos and access troubleshooting resource information 24/7.

Program will also provide professional installer PDF instructions upon request.

Both ecobee and Google offer installer assistance and troubleshooting by phone or chat.

## Troubleshooting and Customer Support

**Google Nest and Google Nest E Troubleshooting and FAQ**

Troubleshoot issues online.

**Google Nest and Google Nest E Customer Support**

Contact Google directly with 24/7 support.

**ecobee3 lite Support Resources**

Look through online materials to learn more about your thermostat.

**ecobee3 lite Customer Support**

Contact ecobee directly.

## Smart Thermostat Resources



### Installation Videos



Google Nest Installation



Google Nest E Installation



ecobee3 lite installation



ecobee3 lite installation  
(without a common wire "C-wire")

## Wiring and Equipment Verification and Compatibility

- Installer will complete the HVAC equipment information located on the back of the Customer Waiver Sheet.
- A common wire adapter **must be installed** in the following situations:
  - If the furnace is ten years older than the A/C unit.
  - If no common wire is present.
- It is the responsibility of the installer to validate that the thermostat chosen by the customer is compatible with the HVAC system,
  - Only devices that are compatible with the home's equipment should be installed.
  - The installer may switch to the other thermostat model if the selected thermostat is not compatible. The customer must be made aware and **provide consent**.

\*Please communicate other scenarios to the Program Team.

# Pre-Test Install System Check



- Check Fan On Mode.
- Check Cooling Mode, verify that fan comes on and outdoor unit is working. Verify cool air is present at the supply duct. Perform this test with a thermometer (infra-red works best).
  - If it is below 55 degrees, do not test the cooling mode.
- Check heating mode, burners, or aux. heat strip works, ensure fan limit is working.
- Visually inspect flue condition.
  - This is for safety and eliminate any code violation (vent connected, not separated, nothing combustible is touching the flue).
- Once the Pre-Test Check is performed, and the system is confirmed to operate normally, continue with the smart thermostat install (including connecting to available WiFi).
- If, during your pre-test check, you determine the unit is not operating normally, you should inform the customer that their unit must be serviced prior to the installation of the new device.

Installer **must** disable system power **prior to** smart thermostat installation (at breaker or furnace switch).

# Post-Install Check Requirements



- Check all functions of smart thermostat for proper working conditions.
- Check fan operation.
- Check cooling operation, if above 55.
  - Confirm outdoor unit is working.
- Check heat operation.
- Check all A/C connections.
- Check Wi-Fi connectivity (if available).
- Check customer's smart phone app is loaded properly (if available).
- After completing the above checks, if you determine the unit is not operating normally, you should inform the customer that their unit must be serviced.
- It is required that the installer attempt to work with the customer to educate the customer on setting up their schedules, switching from heat to cool and connecting their mobile device to the thermostat (if available).

# Customer Waiver



- The customer waiver is an acknowledgement by both parties that the equipment was working properly upon completion of the installation.
- *If the customer does not want to sign the waiver, that's OK. In that case, write the customer's name and address, along with the smart thermostat type and serial number on the back of the waiver.*
- Program Ally is responsible for retaining this waiver and does not need to upload it with the invoice.



Dear Homeowner,

Congratulations on your new smart thermostat! Thank you for participating in the Ameren Illinois Smart Savers Initiative.

During the installation of your smart thermostat, your Program Ally completed the requirements below:

- The Program Ally performed a "Pre-Test Check" to ensure your system was working properly. If the Pre-Test Check failed, the Program Ally will have to reschedule the install. The smart thermostat can be installed once you have your system repaired.
- After the install was completed, the Program Ally performed a "Post-Test Check" in your presence, confirming the proper operation of the smart thermostat and your system is working properly.
- The Program Ally helped you activate your smart thermostat to take advantage of the full range of features your new device offers to help you save energy.
- An adult the age of 18 or older was present for the install.

By signing this agreement, you agree to the requirements of the smart thermostat installation and acknowledge you are receiving your smart thermostat and installation at no cost to you through the Ameren Illinois Smart Savers Initiative.

Thank you!

Ameren Illinois Energy Efficiency Program

\_\_\_\_\_  
Sign Full Name Here

\_\_\_\_\_  
Today's Date

\_\_\_\_\_  
Print Full Name Here

Ameren Illinois Energy Efficiency Programs | 300 Liberty Street, 4th Floor, Peoria IL 61602  
P: 1.866.838.6918 F: 1.309.677.7950 E: IllinoisResidentsEE@Ameren.com





# Educating the Customer Before You Leave



Installer is required to go over these things at each install

1. **Assist** the customer in connecting their chosen device (phone, tablet or pc) to the manufacturer's website.
2. When available, **connect** the smart thermostat to the home's wireless network.
3. **Demonstrate** thermostat use or the mobile app to control the thermostat or set a schedule.
4. **Explain** leave behind materials.
  - Highlight on the customer materials where to call if they need assistance.
5. **Review** the customer waiver and acquire signature.
6. **Inform** the customer they will be receiving a customer satisfaction survey.

- Device Hanger – must be left on smart thermostat or handed to the customer.
  - Installer should emphasize for the customer that the manufacturer’s warranty on the smart thermostat is 12 months.
  - Product support is available 24 hours a day through the manufacturer’s website and through their mobile application (if applicable).
- The unit packaging and all inserts should be left with the customer.
- General flyer for the Ameren Illinois Energy Efficiency Program.
- The Program Ally’s business card.

# After Smart Thermostat Install is Complete



- Ensure that the device is properly setup and **activated**.
- **Explain** the 12-month manufacturer's warranty information along with the 12-month Smart Savers' program support commitment.
- Leave the thermostat box, inserts and device hanger on the smart thermostat.
  - Show the customer where the support information is on the device hanger.
- Ask the customer if they have any questions about the smart thermostat before you leave and direct customer again to reference the device hanger for further support.
- Have the customer to sign the waiver.
  - Capture the serial number (**this is mandatory**) and the **equipment information**.

# Thermostat Recycling



- Ensure proper disposal of the thermostat; make sure to recycle the thermostat.
- For mercury thermostats, double-bag the device.
- If you're unsure where to recycle, visit the [Thermostat Recycling Corporation](#).

A person is sitting on a couch, using a silver laptop. The laptop screen displays the Ameren website, which includes a navigation menu, a search bar, and several content cards. The person's hands are on the keyboard, and they are wearing a blue long-sleeved shirt. A white text box is overlaid on the center of the image, containing the text "Referring Multifamily Customers".

## Referring Multifamily Customers

# Smart Savers – Multifamily Property Referrals



## Multifamily Properties

Many Program Allies have multifamily properties as current customers or may look for multifamily properties to participate. We encourage you to recruit these customers and want to support those efforts!

### Eligibility:

Must be 3 units or more to be considered multifamily (duplexes are single family).

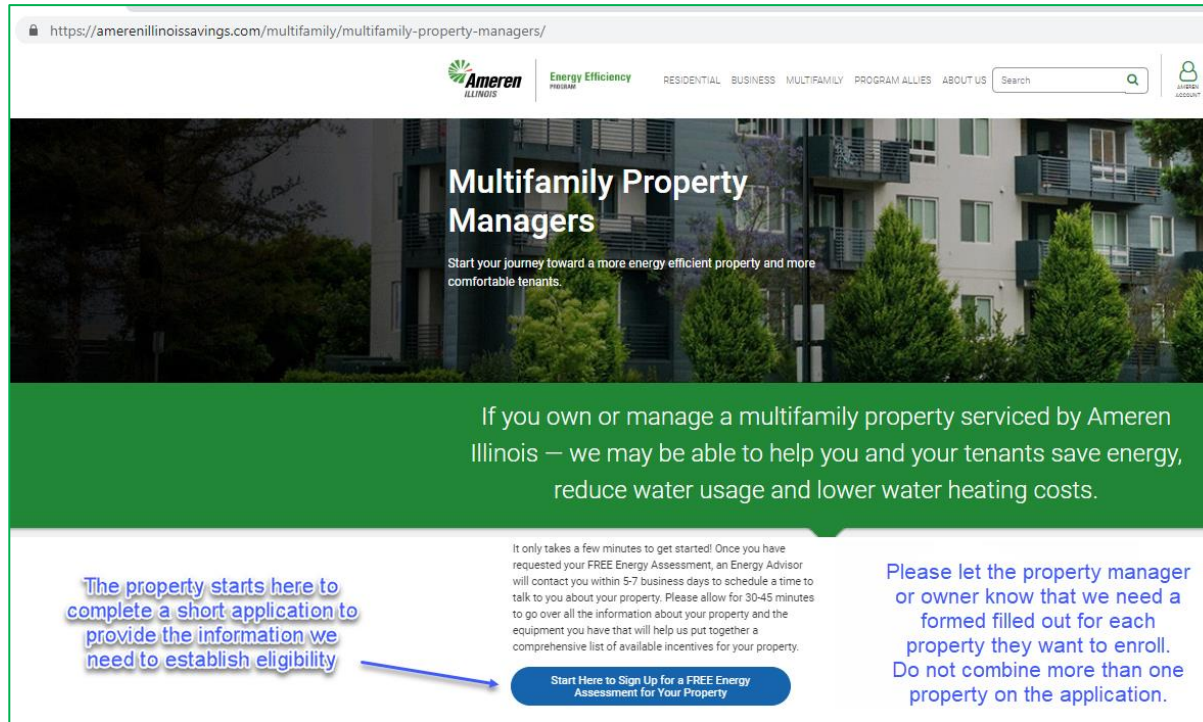
- While a multifamily property may be within a Smart Savers zip code, there are additional criteria we need to assess to determine eligibility.
- Must meet specific criteria surrounding participation in low-income government programs, rent levels, etc.
  - It is very important that the customer include complete information on the intake form or eligibility will be delayed.
  - We can process eligibility and notify the ally in less than 2 business days information is complete on the form.
    - Referring Program Allies can be noted by the customer the assessment application.
  - If a property is not Income Qualified, the Program Ally will be noted as the referring Program Ally for future projects at that location.

**Once eligibility is determined, the referring Program Allies will be notified by phone or email by Jen if the project is approved. Installation cannot be started without prior approval.**

- All Multifamily properties will receive a call from the Ameren Illinois Energy Efficiency Program to discuss participation in a Ameren Illinois One Stop Shop Energy Assessment.
- Smart Savers installation can be done in advance of that.

**If you have a MF referral or other questions, please call Jen Michael.**

## Eligibility Application



The screenshot shows the website <https://amerenillinoisavings.com/multifamily/multifamily-property-managers/>. The page features the Ameren Illinois logo, a navigation menu with links for RESIDENTIAL, BUSINESS, MULTIFAMILY, PROGRAM ALLIES, and ABOUT US, and a search bar. The main heading is "Multifamily Property Managers" with the subtext "Start your journey toward a more energy efficient property and more comfortable tenants." Below this is a green banner with the text: "If you own or manage a multifamily property serviced by Ameren Illinois – we may be able to help you and your tenants save energy, reduce water usage and lower water heating costs." At the bottom, there is a section with a blue button that says "Start Here to Sign Up for a FREE Energy Assessment for Your Property".

**The property starts here to complete a short application to provide the information we need to establish eligibility**

It only takes a few minutes to get started! Once you have requested your FREE Energy Assessment, an Energy Advisor will contact you within 5-7 business days to schedule a time to talk to you about your property. Please allow for 30-45 minutes to go over all the information about your property and the equipment you have that will help us put together a comprehensive list of available incentives for your property.

**Please let the property manager or owner know that we need a formed filled out for each property they want to enroll. Do not combine more than one property on the application.**

**Start Here to Sign Up for a FREE Energy Assessment for Your Property**

If the property needs assistance with filling it out or information, please call Jen at 309.241.3584.

Program Ally should let Jen know by text or email if they have a MF referral.

**Installation is not approved until eligibility is established.**



# Smart Savers – Multifamily Property Referrals

## Eligibility Application



**ENERGY EFFICIENCY PROGRAM**

### Multifamily Property Eligibility Application

It only takes a few minutes to complete this important step towards lowering the energy bills of your properties.

Following your submission, a representative will contact you with more details.

If you have any questions, please call us at 1.866.838.6918

Renters can nominate their properties at: <https://cloud.es.ameren.com/MF/TenantAssessmentSurvey>

Full Name of this Property (if none, name of owner) \*

Property Physical Address \*

Physical Address Line 2

Property City \*

Property County \*

Property State \*

Property Zip \*

Contact First Name \*

Contact Last Name \*

Contact Email \*

Contact Phone Number \*

Format: 000-000-0000

Contact Type \*  
 Property Contact  
 Property Owner  
 Property Manager  
 Other

If you are working with an Ameren Illinois Contractor, please provide their name

Does this Property Have it's own Ameren Illinois Account? \*

Ameren Illinois Account Number

Who pays the Ameren Utility bill for the rental units each month? \*

Property  
 Tenant  
 Both Property & Tenant

Does your property have an Ameren Illinois Commercial Account? \*

Yes  
 No

Commercial Account Number

Total Number of Tenant Units at this Complex \*

Total Number of Buildings with Rental Units at this Property \*

Total Number of Other Buildings (ie: clubhouse, office, or shop bldg) at this Property

Do you own or manage other rental properties? \*

Yes  
 No

If Property is a Public Housing Authority, what type ownership? \*

County  
 State  
 Federally Owned  
 Property is not a PHA  
 Housing Authority Managed - Not Authority Owned Property  
 N/A

Has Property Participated in any of the Following? (Select all that Apply) \*

Section 8  
 USDA Rural Housing  
 Disaster Relief  
 LITC  
 Weatherization Program  
 LIHEAP / Weatherization Program  
 HFA  
 RAD  
 HED  
 None of the Above

Can Property Provide Proof of Participation in the Above? Please email documentation to IllinoisResidentialEE@ameren.com \*

Yes  
 No  
 N/A

**Tell Us About Your Property**  
\*All required fields

Are there at least three residential units at this property? \*

Yes  
 No

**Tell Us About the Types of Resident Units at Your Property**  
\*required, enter zero (0) if none

Number of Efficiency/Studio Units \*

Number of Bedroom 1 Units \*

Number of Bedroom 2 Units \*

Number of Bedroom 3 Units \*

Number of Bedroom 4 Units \*

Number of Other Type of Units \*

**Tell Us About the Average Rent for Each Type of Unit**  
\*Required, if rent does not apply, enter zero (0)

Rent for the Efficiency/Studio Unit \*

Rent for the Bedroom 1 Units \*

Rent for the Bedroom 2 Units \*

Rent for the Bedroom 3 Units \*

Rent for the Bedroom 4 Units \*

Rent for the Other Type of Units \*

By checking this box, I confirm that all information listed above is true and accurate and completing this application does not guarantee my household will receive incentives. Ameren Illinois may change the program requirements, incentives, or terms and conditions at any time. The Program may send your contact information to Program Allies related to your project. \*

**The rent levels should be their stated rents for non assisted renters**

**If all residents are assisted, it is possible to be \$0**

Ameren Illinois [Privacy Policy](#)



A man with short dark hair and a light beard, wearing a dark blue long-sleeved shirt, is looking down at a white smartphone he is holding in his right hand. The background is a bright, out-of-focus window with multiple panes, suggesting an indoor setting with natural light.

**SMART SAVERS INITIATIVE  
PROGRAM ALLY MARKETING SUPPORT**

# Smart Savers Initiative Marketing Co-Branding Requirements

- Ameren Illinois approval is needed for all Program Ally-created content (social media, emails, mailers or materials).
- Co-Branding Requirements document located on the Residential Program Ally Portal.



## CO-BRANDING REQUIREMENTS

For Ameren Illinois Registered Program Allies

Thank you for being a Registered Program Ally with the Ameren Illinois Energy Efficiency Program. When it comes to marketing, you have two options of co-branding with the Program:

- 1) Free, Program designed and pre-approved co-branded collateral.
- 2) Program Ally custom designed materials with the approved Ameren Illinois Energy Efficiency graphic and/or text references.

Program pre-designed co-branded materials are designed by the Ameren Illinois Energy Efficiency Program, it includes your contact information, and are readily accessible to Program Allies for immediate use. These materials are free, pre-approved, and can be printed and/or downloaded at your convenience.

As for custom designed materials, this guide specifically addresses the requirements you **MUST** follow in the approval process of incorporating the approved Ameren Illinois Energy Efficiency graphic and/or any text references to your participation with our Program within your materials.

To request pre-designed materials or to submit custom materials, visit  
[AmerenIllinoisSavings.com/Ally](https://AmerenIllinoisSavings.com/Ally)

### PROGRAM ALLY CO-BRANDING

Materials co-branded with reference to the Ameren Illinois Energy Efficiency Program are intended to support the promotion of the Program Ally's company. Any Ameren Illinois components should be secondary and smaller than the Program Ally's company components.

Program Allies may produce marketing or promotional materials that are co-branded with the Ameren Illinois name and/or approved graphic as outlined in this guide.

### APPROVED GRAPHIC

Registered Program Allies may only use the approved graphic to represent their involvement in the Ameren Illinois Energy Efficiency Program. **Program Ally use of any other Ameren Illinois logo is strictly prohibited.**

**IMPORTANT NOTE:** This graphic has its own approved uses in advertisements, marketing materials, and business cards. Please refer to the **APPROVED USES** section on page 3 for more details.



ENERGY EFFICIENCY PROGRAM  
Registered Program Ally



Energy Efficiency  
REGISTERED PROGRAM ALLY

# Smart Savers Initiative Marketing Social Media/Web Co-Branding



## Smart Savers Social Media and Website Toolkit



ENERGY EFFICIENCY PROGRAM

The Ameren Illinois Energy Efficiency Program is committed to helping customers find ways to improve comfort, manage usage and reduce costs. To do this, we want to ensure our Program Allies have the resources needed to help customers decrease energy usage and start saving on energy costs!

This toolkit is designed to support our Program Allies with pre-approved social media content to provide your customers with energy-saving information.

### SOCIAL MEDIA – FACEBOOK, LINKEDIN AND TWITTER

The Ameren Illinois Energy Efficiency Program staff will support Program Allies by providing pre-approved content and design. If you wish to create your own social media posts, not using pre-approved content and design, please review the Social Media section of the Co-Branding Guidelines before submitting for approval which can be found [HERE](#).

Note: You must tag Ameren Illinois when posting any co-branded content to social media.

#### WHERE TO SHARE

Here are some places to tell the story of your Program participation:



Post details and photos of your participation with Ameren Illinois on your Facebook page. Encourage your followers to like and share. Tag: Ameren Illinois



Make every Twitter character count with genuine enthusiasm and a conversational tone. Tag: @AmerenIllinois



Include details of your participation with Ameren Illinois on your company's LinkedIn Page.

### PRE-APPROVED WEBSITE LANGUAGE

[Program Ally Name] is a registered Program Ally with the Ameren Illinois Energy Efficiency Program's Smart Savers Initiative. The Smart Savers Initiative is designed to target key residential communities and help them acquire a smart thermostat at **no cost**. Check your eligibility to claim your free smart thermostat and be sure to select us as your professional installer to get FREE installation.

### PRE-APPROVED SOCIAL MEDIA GRAPHICS:

Click any of the graphics below to download. In order to use these graphics, they must be paired with one of the text options listed in the next section of the document. Otherwise, please submit social media graphics or text options you create to the Ameren Illinois Energy Efficiency Program for review and approval prior to posting.



### PRE-APPROVED SOCIAL MEDIA LANGUAGE:

#### Text Option 1:

Get a Google Nest Thermostat or ecobee3 lite at no cost from the Ameren Illinois Energy Efficiency Program! Visit [AmerenIllinoisSavings.com/SmartSavers](#) to see if you qualify and be sure to select us as your professional installer.

#### Text Option 2:

We've teamed up with the Ameren Illinois Energy Efficiency Program to offer \$0 smart thermostats to qualifying customers. Get an ecobee3 lite or a Google Nest Thermostat at no cost! Plus, when you choose [company name], we'll install it for you FREE! Visit [AmerenIllinoisSavings.com/SmartSavers](#) to see if you qualify.

#### Text Option 3:

SPECIAL ANNOUNCEMENT! We've partnered with the Ameren Illinois Energy Efficiency Program to offer \$0 smart thermostats to qualifying customers. Get an ecobee3 lite or a Google Nest Thermostat at no cost! Plus when you choose [company name], we'll install it for you for free! See if you qualify at [AmerenIllinoisSavings.com/SmartSavers](#).

#### Text Option 4:

To help our community save energy, the Ameren Illinois Energy Efficiency Program is providing thousands of smart thermostats to customers in select areas at no cost! Visit [AmerenIllinoisSavings.com/SmartSavers](#) to see if you qualify and be sure to select us as your professional installer to get FREE installation!

#### Text Option 5:

Get an ecobee3 lite or a Google Nest Thermostat at no cost through the Ameren Illinois Energy Efficiency Program. Plus, when you choose [company name], we'll install it for you for free! See if you qualify at [AmerenIllinoisSavings.com/SmartSavers](#).

# Smart Savers Initiative Marketing Collateral for Program Allies



## KNOCK, KNOCK.

**YOU MAY QUALIFY FOR A FREE SMART THERMOSTAT.**

Your neighbor just had a smart thermostat professionally installed at no cost. What about you?

Visit [AmerenIllinoisSavings.com/SmartSavers](http://AmerenIllinoisSavings.com/SmartSavers) or call 1.866.838.6918 to see if you qualify for a \$0\* Google Nest Thermostat or ecobee3 lite.

**SELECT US AS YOUR PROGRAM ALLY** and we'll schedule your FREE installation!

\*Customer must have an existing Ameren Illinois residential account. Ameren Illinois gas and electric customers are eligible for the Smart Savers Initiative. Most boiler systems are not compatible with smart thermostats and are not recommended for this program. Please visit [AmerenIllinoisSavings.com](http://AmerenIllinoisSavings.com) to learn more ways you can save. Google and Google Nest Thermostat are trademarks of Google LLC.

You may qualify for a \$0 Google Nest Thermostat or ecobee3 lite smart thermostat through the Smart Savers Initiative.

Visit [AmerenIllinoisSavings.com/SmartSavers](http://AmerenIllinoisSavings.com/SmartSavers) or call 1.866.838.6918 for details.

Adding a smart thermostat in your home can help improve the way you use energy, ultimately saving money each month.

Qualifying customers are eligible to choose between an ecobee 3 lite or Google Nest Smart Thermostat at no cost shipped to their home. Some customers, based on availability, may also be eligible for professional installation from an Ameren Illinois Energy Efficiency Program Ally.

**Smart thermostats:**

- Help lower your heating and cooling costs.
- Adapt to your schedule and preferences.
- Can be controlled from any smart device.
- Track your energy usage over time.
- Send you alerts about your energy usage.

**SELECT US AS YOUR PROGRAM ALLY** and we'll schedule your FREE installation!

Visit [AmerenIllinoisSavings.com/SmartSavers](http://AmerenIllinoisSavings.com/SmartSavers) to claim your FREE smart thermostat. Questions? Call 1.866.838.6918.

\*Customer must have an existing Ameren Illinois residential account. Ameren Illinois gas and electric customers are eligible for the Smart Savers Initiative. Most boiler systems are not compatible with smart thermostats and are not recommended for this program. Please visit [AmerenIllinoisSavings.com](http://AmerenIllinoisSavings.com) to learn more ways you can save. Google and Google Nest Thermostat are trademarks of Google LLC.

## Welcome Home

Questions about your thermostat?

For assistance with your new thermostat, visit [AmerenIllinoisSavings.com/SmartHelp](http://AmerenIllinoisSavings.com/SmartHelp).

For more information about about energy-saving opportunities, visit [AmerenIllinoisSavings.com/SaveMoney](http://AmerenIllinoisSavings.com/SaveMoney) or call 1.866.838.6918.

## [Residential Program Ally Portal](#)

Username: programally

Password: saveenergy

- Access the latest Co-Branding Requirements document.
- Order marketing materials, submit materials for approval.
- Download approved logos.

### Co-Branding Requirements

Please read through the Co-Branding Requirements document linked below before creating any co-branded or Program-related marketing collateral. You will find important information on approved uses, text references, and logo requirements.

[Co-Branding Requirements](#)

### Approved Program Ally Logos

Download the approved Registered Program Ally logos at the links below. Before using the logos in any of your marketing, be sure to read through the [Co-Branding Requirements](#).

Download approved Registered Program Ally logos: [Horizontal Version](#) | [Vertical Version](#)



### Submit Co-Branded Materials for Review & Approval

All co-branded materials created by our Program Allies must be approved by our Program per the [Co-Branding Requirements](#). You can submit a request to have your materials, webpages, social media posts, etc. reviewed and approved by our Program at the link below.

[Submit Co-Branded Materials for Review & Approval](#)

### Program Ally Marketing Portal

You can order Program-designed and pre-approved co-branded materials for FREE! You can simply download PDF versions or have them shipped to you free of charge.

[Create an Account for the Marketing Portal](#)  
[Log in to the Marketing Portal](#)

### Program Ally Social Media Toolkit

You can download Program-designed and pre-approved social media posts for FREE from our Program Ally Social Media Toolkit! Click the link below to learn more about the requirements and get started.

[Program Ally Social Media Toolkit](#)

### Smart Savers Program Ally Social Media and Website Toolkit

Find pre-approved website language and downloadable social media posts for FREE from our Smart Savers Program Ally Social Media and Website Toolkit! Click the link below to learn more about the requirements and get started.

[Smart Savers Program Ally Social Media and Website Toolkit](#)

- Program Ally Marketing Portal.
  - Create an account using the link from the previous slide.
  - Log in on an ongoing basis using the second link.
  - Order materials to be shipped to you or downloaded free of charge.
- Smart Savers Program Ally Social Media and Website Toolkit.
  - PDF file to copy language and download graphics.

#### **Program Ally Marketing Portal**

You can order Program-designed and pre-approved co-branded materials for FREE! You can simply download PDF versions or have them shipped to you free of charge.

[Create an Account for the Marketing Portal](#)

[Log in to the Marketing Portal](#)

#### **Program Ally Social Media Toolkit**

You can download Program-designed and pre-approved social media posts for FREE from our Program Ally Social Media Toolkit! Click the link below to learn more about the requirements and get started.

[Program Ally Social Media Toolkit](#)

#### **Smart Savers Program Ally Social Media and Website Toolkit**

Find pre-approved website language and downloadable social media posts for FREE from our Smart Savers Program Ally Social Media and Website Toolkit! Click the link below to learn more about the requirements and get started.

[Smart Savers Program Ally Social Media and Website Toolkit](#)

## Jordan Nelson

Program Ally and Midstream Marketing Manager

Leidos, Inc. – An Ameren Illinois Energy Efficiency Contractor

[jnelson2@ameren.com](mailto:jnelson2@ameren.com)

309.981.9496





A person is sitting on a couch, using a silver laptop. The laptop screen displays the Ameren website, which includes a navigation menu, a search bar, and several content cards. The person's hands are on the keyboard, and they are wearing a blue long-sleeved shirt. A white USB cable is plugged into the laptop. The background is a blurred indoor setting.

**QUESTIONS?**



**Energy Efficiency**  
PROGRAM

***AmerenIllinoisSavings.com***