



Process Check List: Customer



PRE-DEAL: INTERNAL REQUIREMENTS

<input type="checkbox"/>	SIGN SUPPLIER LETTER OF AUTHORIZATION (ALLOWS SUPPLIER TO DOWNLOAD USAGE DATA)
<input type="checkbox"/>	ENSURE ALL ACCOUNTS/BUILDINGS ARE INCLUDED, ALL USAGE DATA IS COMPLETE
<input type="checkbox"/>	UPLOAD ACCOUNTS TO MEGAWATT HOUR SYSTEM
<input type="checkbox"/>	CONFIRM CONTRACT END DATE, ACCOUNT ENROLLMENT DATE (EG. UTILITY NEEDS 15 DAYS ADVANCED NOTICE TO ENROLL ACCOUNTS)
<input type="checkbox"/>	DETERMINE PRODUCT PREFERENCE (FIXED, INDEX, BLOCK & INDEX)
<input type="checkbox"/>	REVIEW SUPPLIER CONTRACT, IDENTIFY ISSUES AHEAD OF TIME



PRE-DEAL: WITH SUPPLIER

<input type="checkbox"/>	COMMUNICATE SIGNING ENTITIES, CONFIRM CONTRACT GENERATION DETAILS
<input type="checkbox"/>	DETERMINE ADVANCE NOTICE REQUIRED FOR EXECUTABLE PRICING
<input type="checkbox"/>	CONFIRM PRODUCT PREFERENCES AND SIGNING TIMING



DURING DEAL: INTERNAL REQUIREMENTS

<input type="checkbox"/>	CONFIRM TIMING & SIGNATORY AVAILABILITY
<input type="checkbox"/>	GET SIGN OFF ON PRODUCT AND STRATEGY FROM DECISION MAKERS
<input type="checkbox"/>	CONFIRM CONTRACT DELIVERY PROCESS FROM SUPPLIER
<input type="checkbox"/>	ASK SUPPLIER TO IDENTIFY ALL CONTRACT BLOCKS ON CONTRACT
<input type="checkbox"/>	ENSURE ALL ADDITIONAL FORMS COMPLETE: AGENCY AGREEMENT, INVOICES, CREDIT
<input type="checkbox"/>	CONFIRM PRICING (MARKET PRICING & COMPETITIVE OFFERS) IN MEGAWATT HOUR



DURING DEAL: WITH SUPPLIER

<input type="checkbox"/>	CONFIRM PRICING, PRODUCT PREFERENCE, AND CONTRACT SIGNING DEADLINE
<input type="checkbox"/>	CONFIRM TIMING OF UTILITY ACCOUNT ENROLLMENTS WITH SUPPLIER
<input type="checkbox"/>	SEND EXECUTED AGREEMENTS; REQUEST CONFIRMATION OF RECEIPT
<input type="checkbox"/>	RECEIVE NOTICE OF BOOKED DEAL ON SIGNING DATE



POST DEAL: INTERNAL REQUIREMENTS

<input type="checkbox"/>	TAKE SNAPSHOT OF MWH SITE: CONFIRM MARKET CONDITIONS AT SIGNING
<input type="checkbox"/>	CONFIRM ACCOUNT SWITCH DATES WITH SUPPLIER
<input type="checkbox"/>	ENSURE INVOICING IS CURRENT AND ACCURATE
<input type="checkbox"/>	CONFIRM AND SEND TAX EXEMPTION FORM AS NEEDED



POST DEAL: WITH SUPPLIER

<input type="checkbox"/>	GET FULLY-EXECUTED CONTRACT FROM SUPPLIER
<input type="checkbox"/>	UPDATE CONTRACT TYPE IN MEGAWATT HOUR FOR TRACKING PURPOSES
<input type="checkbox"/>	GET CONFIRMATION OF UTILITY SWITCH DATES VIA EMAIL