

# Success Stories

## Rate Optimization and Bill Audit



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### MULTI-FAMILY

#### Senior Housing Owner Midwest

## \$80,000

Reviewed utility bills for ten different properties and identified refunds and rate changes at all ten locations saving more than \$80,000 in year one.

#### Single Apartment Complex Dallas, TX

## \$241,000

Argued on behalf of our client that estimated readings caused an excessive invoice and that our high use alert process would have caught this earlier had the actual readings been utilized. The client received a \$241,000 credit.

#### New Jersey-Based Owner National

## \$700,000

Reviewed utility bills at this national organization and identified savings at over 100 properties. Refunds for this company have totaled \$477,000 so far, with \$220,000 in annual savings.

#### MN Based Multi-Family Owner

Minneapolis, MN

## \$53,000

Discovered a single billing error worth \$53,000. Additional savings have totaled over \$70,000.

### INDUSTRIAL

#### Pet Food Manufacturer Midwest

## \$587,000

Conducted sales tax allocation study and all filing requirements that generated over \$587,000 in refunds and \$249,000 in annual savings.

#### Bio-Tech Company Minnesota

## \$100,000

Provided tax allocations study and all filing requirements that resulted in a \$100,000 refund and over \$30,000 saved annually.

#### Med-Tech Manufacturer National

## \$2,000,000

Tax allocations at 14 sites generated nearly \$2 million in refunds and \$800,000 in annual savings.

#### Single site manufacturers in various industries receiving refunds and annual savings of various amounts:

Brewery  
Corrugated  
Pharmaceutical  
Grain mill/elevator  
Printing  
Car washes  
Mining

Medical device  
Food processing  
Bakeries  
Metal fabricator  
Biotechnology and more!

### COMMERCIAL

#### HQ Office Building Minneapolis, MN

## \$14,000

Recovered funds for a repetitive billing error even after the electric utility indicated the bills were accurate. Savings over \$14,000.

#### Office Buildings Minnesota

## \$5,000

Converted electric accounts from mandatory time of day rates to general service after they reduced their electric consumption and fell below the 1,000 kW threshold saving 2-4% and many thousands of dollars per year per building.

#### Fitness Center Franchise National

## \$98,000

Identified rebates, billing errors, and exemptions which resulted in refunds and savings of \$98,000.

### VALUE BY CLIENT TYPE

Scale 1-100 what value does each sector have in rate optimization (estimated percentage of properties where savings opportunities are identified per sector).

**75%**  
Multi-family

**50%**  
Industrial

**25%**  
Commercial

**25%**  
Non-profit