

CATALYST

Welcome to Catalyst 2025!



Shawn Lankton

Chief Executive Officer

What a great community

ENERGYCAP

ECO² Champions



Share ideas // Build community // Make the world a greener place

Nice to meet y'all!

🌴 Grew up in Northwest Florida

🧐 Trained as an Electrical Engineer

- 8 years at Georgia Tech (BS, MS, and PhD)
- Studying robotics, AI, and Computer Vision

🚀 Career growing software companies

- Building incredible teams
- Shipping amazing products
- Helping customers become wildly successful!

🌱 9 months in at EnergyCAP

- Awesome mission, product, and team
- Passionate customers and strong community
- Excitement for what's ahead!



Market context

Energy news

- Electrification
- AI workloads
- Geopolitical shocks
- Production shifts



What's ahead

- Accelerating technology
- Volatile pricing
- More expensive inputs
- Focus on cost cutting



Climate impact

- Still critical
- Still getting worse
- Mandates coming fast
- Pressure from constituents



A photograph of a forest floor at sunrise or sunset. The sun is low in the sky, creating a strong lens flare and casting a warm, golden light through the trees. The forest floor is covered with green grass and numerous yellow dandelions. The trees are tall and thin, with their trunks visible against the bright background.

Opportunity for leaders with the best data

Your investments now matter more than ever

Let's centralize data, capture insights, and control costs

What to expect at Catalyst

Training

Learn about EnergyCAP and energy management tactics

Networking

Meet other EnergyCAP users, swap stories, and build your network

New faces

Meet new members of the EnergyCAP team

Launch time

An exciting product launch this week - stay tuned!

What's ahead for EnergyCAP?

- Improving the speed and accuracy of BillCAPture
- Bringing your buildings' attributes into EnergyCAP
- Using AI to help you capture actionable insights faster
- Growing this network of empowered energy leaders

New faces at EnergyCAP



Trey Simonton // Sales

Loves finding issues that we can solve and make us easy to work with!



Jared Toll // UK-Europe Sales

Loves helping organizations accelerate their technology plans with the right solution!



Dan Flanigan // Product

Loves building products that solve problems and delight customers!

CATALYST



What's new with EnergyCAP?



Dan Flanigan

Chief Product Officer

Welcome to Catalyst 2025

Celebrating your
impact

This session is dedicated to you—our partners in energy, data, and operational excellence.

At EnergyCAP, we recognise that:

- Utility management is the cornerstone of your energy and sustainability strategy
- The role of the ESCO is evolving—from project-focused delivery to holistic energy and commodity cost management
- We have a proven history supporting direct clients and ESCOs alike—we're proud to be the first to bring these solutions together
- Our roadmap is purpose-built to serve ESCOs and customers together, with tools that scale as your strategy evolves
- Let's dive in together.

Meet our Energy Manager, Jordan

Jordan spends his time:

- Monitoring energy usage and trends
- Wrangling energy costs
- Planning, executing and tracking energy projects
- Managing ad-hoc requests
- Generating reports and dashboards
- Coordinating with lots of other teams
- Supporting compliance, benchmarking, and regulatory goals
- Planning and negotiating energy spend



Starting the day with EnergyCAP

Problem

Budget meeting in 30 minutes!

Solution

Report 07

- Compare actual to budget values across meters, sites, or your entire organization
- Compare cost, usage, or both
- Use bills from external vendors or Chargebacks

Report 16

- List of bill import errors and details
- Quickly resolve bill kickouts

Imported	Imported By	Batch	Error Message	Bill	Begin Date	End Date
2/28/25	BILLCAPTURE	022825_BILLCAP	Unable to find Account: 124907-7 linked to Vendor Code:	Click for Image	01/29/25	02/28/25
2/28/25	BILLCAPTURE	022825_BILLCAP	Unable to find Account: 124907-7 linked to Vendor Code:	Click for Image	01/29/25	02/28/25
2/28/25	BILLCAPTURE	022825_BILLCAP	Unable to find Account: 3432755802 linked to Vendor Code: PGE	Click for Image	01/15/25	02/15/25
2/28/25	BILLCAPTURE	022825_BILLCAP	Unable to find Account: 293-228-210-0 linked to Vendor Code: HVWATER	Click for Image	01/14/25	02/15/25

University electricity costs								
Building name	Feb-25				Mar-25			
	Cost (\$)				Cost (\$)			
	Budget	Actual	Diff	Diff (%)	Budget	Actual	Diff	Diff (%)
	\$ 60,398	\$ 58,693	\$ 1,705	2.8%	\$ 58,020	\$ 58,937	\$ (917)	1.6%
10th & Central Garage	\$ 7,698	7785	\$ (87)	1%	\$ 6,780	\$ 7,102	\$ (322)	5%
Alpha Hotel	\$25,270	22609	\$ 2,661	11%	\$ 24,340	\$ 24,765	\$ (425)	2%
Campus Living Center	\$12,056	13215	\$(1,159)	10%	\$ 12,000	\$ 12,142	\$ (142)	1%
Food Sciences Complex	\$13,089	12997	\$ 92	1%	\$ 12,900	\$ 12,940	\$ (40)	0%
Twin Pines Garage	\$ 2,285	2087	\$ 198	9%	\$ 2,000	\$ 1,988	\$ 12	1%

Mid-morning: commodity deep dive

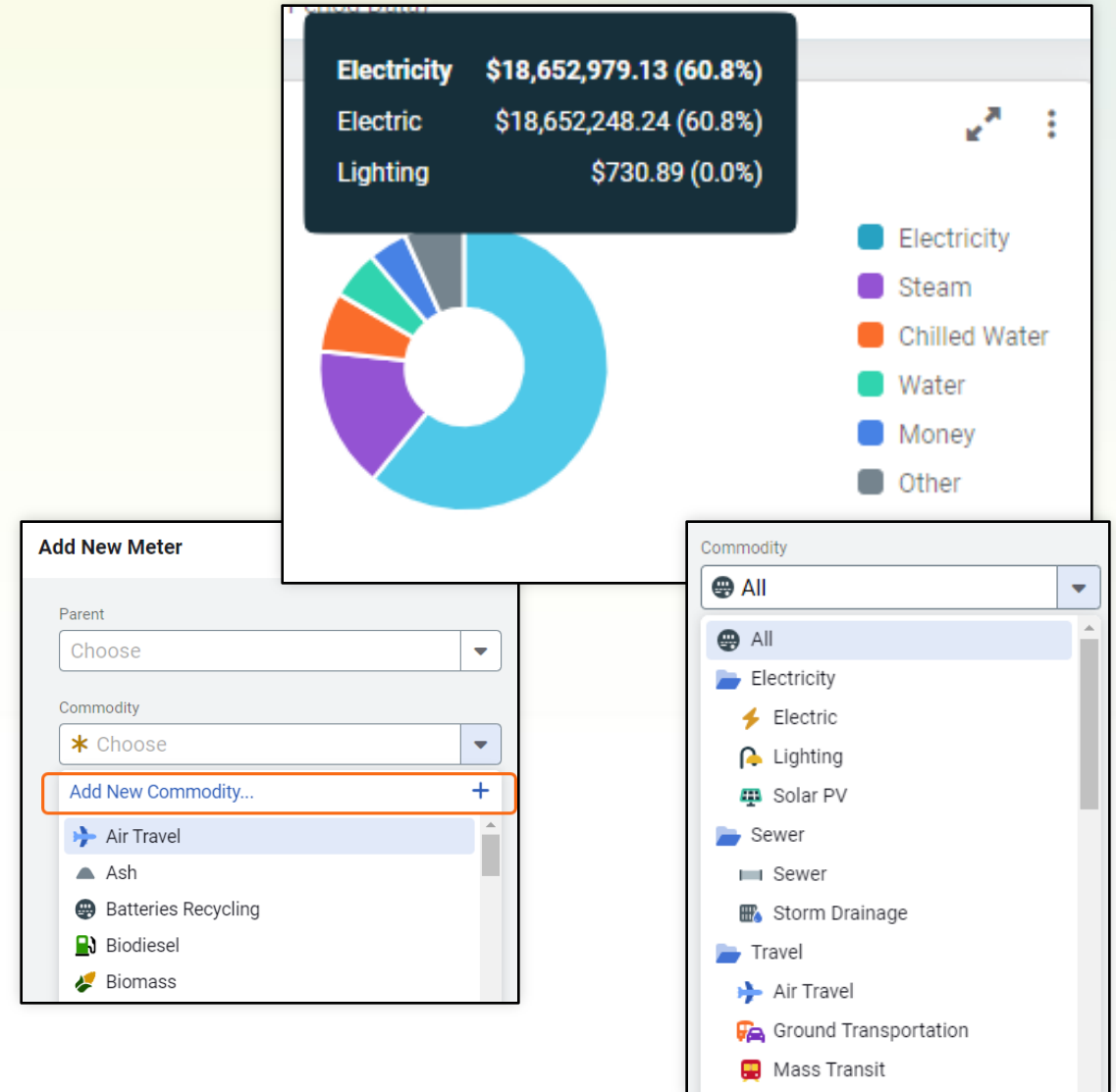
Problem

Colleague needs help comparing lighting vs building usage as part of total electricity usage across several sites.

Solution

Commodity categories

- Separate commodities into their individual sources
- See and report on use and cost data with deep granularity
- Use default categories or create your own



Lunch and an unexpected request

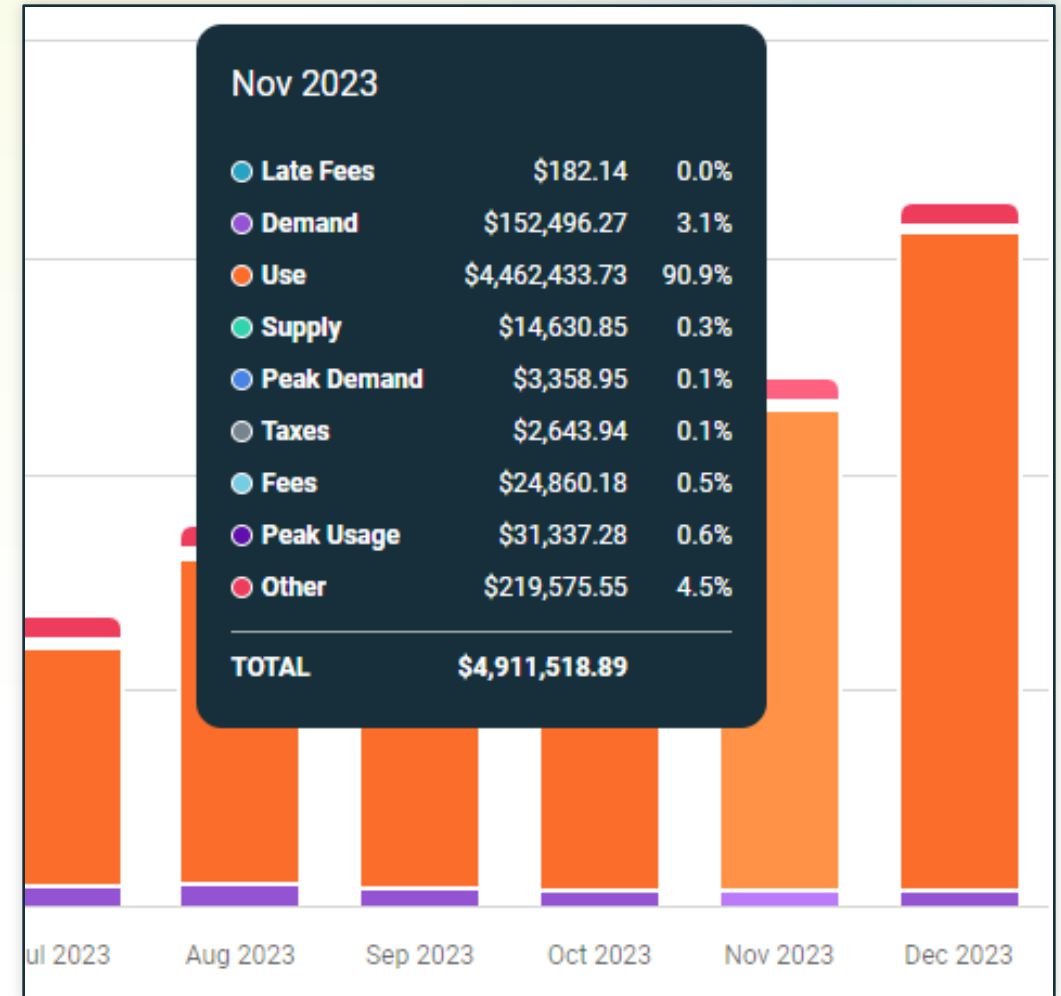
Problem

Leadership has a last-minute request to see utility cost information – minus taxes and fees.

Solution

Cost categories

- Create categories and assign different bill line types
- Understand actual utility use vs taxes, fees, etc.
- Track late fees



Afternoon carbon accounting

Problem

An auditor is going to need details on our PPA plan and emissions data, including supporting documentation, and bills that have multiple categories represented.

Solution

- Market and location-based emissions updates
- Quick and easy bulk category and factor updates
- Custom fields for emissions sources and collections

The screenshot displays the 'Emissions Source Details' form within a 'Sustainability Reporting' interface. The form includes a status toggle set to 'Active', a name field '10th & Central Parking Garage-ELE02', and a code field '10TH & CENTRAL PARKING GAR-ELE'. It also features a type dropdown set to 'Electric' and a parent collection dropdown set to '10th & Central Parking Garage'. Below these are two rows for scope categories and GHG factors. The first row has 'Scope 2 - Purchased Electricity -' and 'RFC East'. The second row has 'Scope 2 - Carbon Offsets and Ad' and a search field for GHG factors. A third row is partially visible. A sidebar menu on the left shows options: 'Custom Fields for Collections', 'Custom Fields for Sources' (highlighted), and 'Show Inactive Sources'. The top right of the form has 'Cancel' and 'Save' buttons.

Emissions Source Details Cancel Save

Status: Active Inactive

Name: 10th & Central Parking Garage-ELE02 Code: 10TH & CENTRAL PARKING GAR-ELE

Type (commodity): ⚡ Electric Parent collection: 🏢 10th & Central Parking Garage

Scope category: Scope 2 - Purchased Electricity - GHG factor: RFC East ×

Factor details

Scope category: Scope 2 - Carbon Offsets and Ad GHG factor: ⚡ Search ×

Factor details

GHG factor: ⚡ Search ×

Factor details

Sustainability Reporting

- Custom Fields for Collections
- Custom Fields for Sources**
- Show Inactive Sources

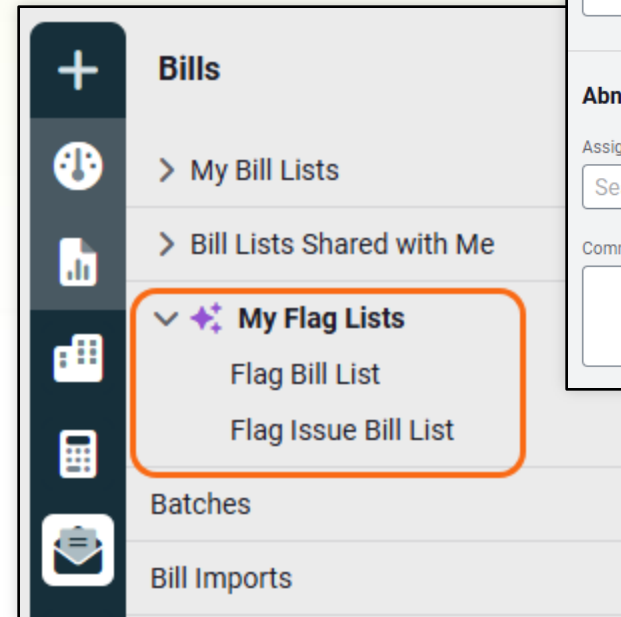
Mid-afternoon: managing utility bills

Problem

Lots to do! You've got bill flags to review, new bills to enter, and a dozen pressing issues waiting.

Solution

- Beefed-up bill flag management
- Issue management
- Bulk action
- Split account charges
- Status updates at-a-glance

A screenshot of the 'Manage Issues' modal form. The modal has a title bar with the text 'Manage Issues' and a 'Close' button. It contains two sections: 'Gap Between Bills' and 'Abnormal Cost'. Each section has a 'Resolve' checkbox with a help icon, an 'Assignee' field with a search input 'Search for users to assign', and a 'Comment' text area.

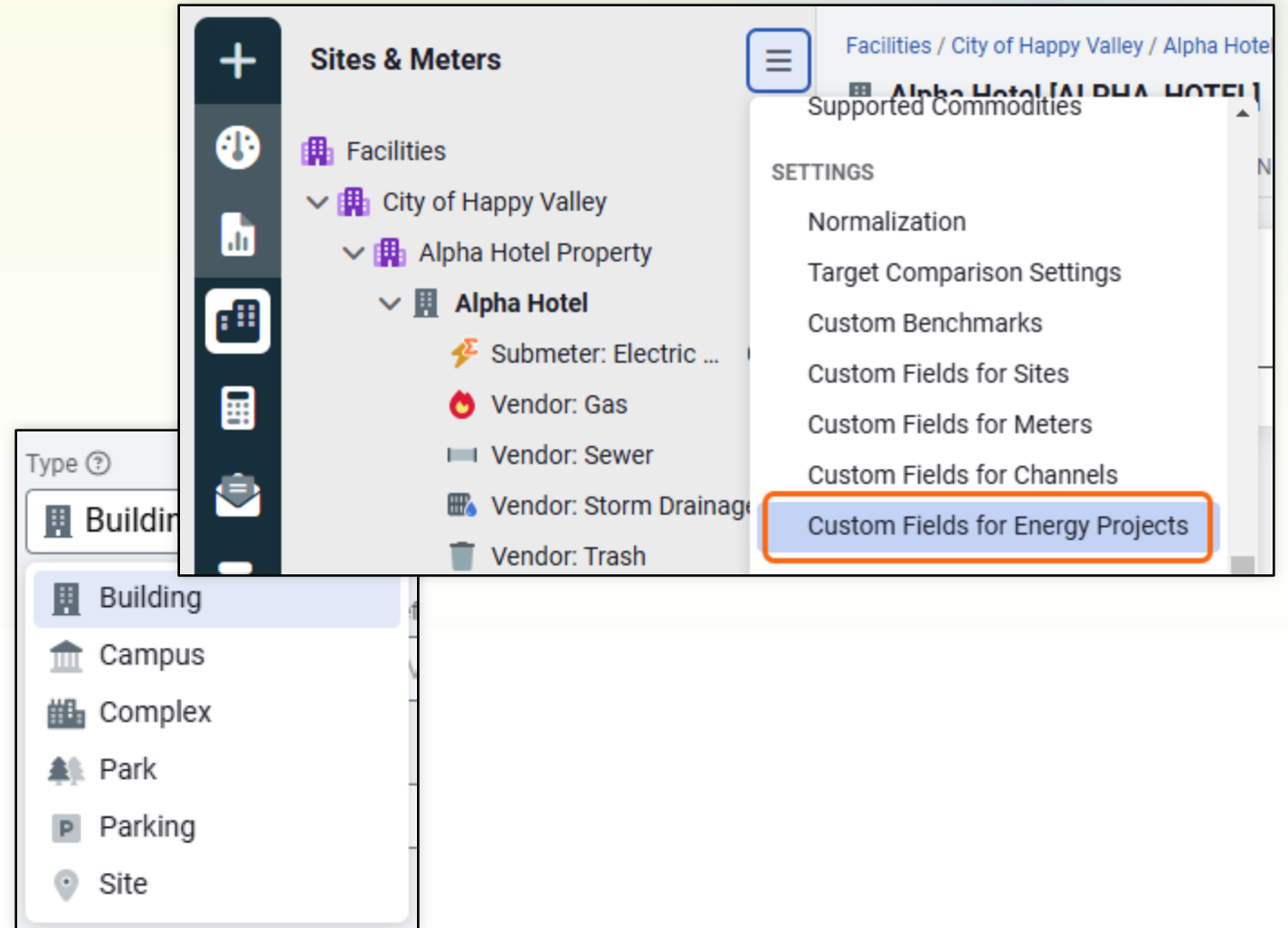
Ending the day with EnergyCAP

Problem

Tomorrow we're reviewing end of quarter ECM results. I need energy project documentation to be centralized and readily available.

Solution

- Custom fields for projects
- A simplified Energy Projects layout



EnergyCAP Academy // What's new



EnergyCAP Academy has a new home

...right inside Eco Champions!

Access learning, share ideas, and get support all in one place.



2 new free simulations

Hands-on, step-by-step simulations to walk you through key tasks.

- "How do I enter a bill manually in EnergyCAP?"
- "How do I manage my bill data?"
- Scan the QR code or visit Eco Champions



Just the beginning

All new content, practical tutorials, and an updated Academy are coming your way for free.

You asked, we listened—training resources, more of them, on-demand 24/7.

Coming soon:

A new era for Smart Analytics



Smart Analytics is moving...into Utility Management

- Get ready for a brand-new, reimagined version of Smart Analytics—rebuilt from the ground up as a seamless add-on to Utility Management.



What's new:

- Fully integrated in the EnergyCAP platform
- Modernized experience with a focus on usability and insights
- Designed for existing Utility Management customers as an advanced analytics layer

Let's take a look

One solution, one price

Get everything EnergyCAP has to offer bundled into one powerful subscription:

- Utility Management
- Carbon Hub
- Smart Analytics
- Chargebacks
- Advanced accounting
- BI reports

No more picking and choosing. Just one platform, one price, and total control over your energy and sustainability data

Catalyst exclusive: unlock more value with EnergyCAP

Ready to Take the Next Step?

You've seen what the Premium Platform can unlock—now let's make it even more accessible.



Exclusive Catalyst Europe Offers

- Up to 20% off onboarding and implementation fees
- 10% off standard platform pricing
- 3-year price lock for contracts signed by 30 June

(Excludes Bill CAPture and Managed Services)

Let's connect!

Trey, Jared, and the EnergyCAP team are here in London to meet with you

- Get your questions answered
- Schedule a meeting
- Explore upgrade opportunities
- See how others are scaling their EnergyCAP success

Thank you!

