



RILA RETAIL ADVISOR FOR ENERGY MANAGEMENT— QUICK START GUIDE

Follow these steps to get started with the RILA Retail Advisor for Energy Management.

STEP 1: GET REGISTERED

To start, register your organization and team with this [form](#). You must identify an Organization Manager, who will be the main Advisor contact and have administrative abilities such as starting assessments and managing team member roles. Once registration is complete, team members will receive an email with log-in information and can access the [Advisor](#).

THE ADVISOR IS BASED ON THE [ENERGY MANAGEMENT LEADERSHIP MODEL \(EMLM\)](#) FRAMEWORK FOR A RETAIL ENERGY PROGRAM

STEP 2: CREATE AN ASSESSMENT

To start a new assessment, click on the blue "Add Assessment" button on the right. Only the Organization Manager can start a new assessment or see the "Add Assessment" button.

The assessment process has 4 stages:

1. **Background** – information about the organization
2. **Questionnaire** – program assessment
3. **Review** – questionnaire is complete but changes can still be made.
4. **Completed** – the assessment is final

You do not have to finish an assessment in a single session, and can go back and forth between stages. However, make sure to "Save Progress" with the blue button in the lower right corner.

User permissions to edit assessments and view results is based on their role, which the Organization Manager designates using the Collaboration Menu on the left side. Team members and organizations are added in Step 1; to add more the Organization Manager can email energyadvisor@rila.org.

STEP 3. REVIEW THE GUIDANCE

Click on the Guidance menu on the left to see recommendations generated based the organization's background and questionnaire answers.

STEP 4: REVIEW RESULTS AND PEER BENCHMARKING

For results, select "EMLM Level" under the Results Menu on the left side. Drill down using the grey chevrons at the end of each line in the Category Key. For benchmarking, select the "Peer Benchmarks" tab on the main screen and click on the "Peer Benchmark" button on the right side. Use the drop-down menu to compare your program to different peer groups.

USE THE CHEVRONS (>) FOR MORE INFORMATION OR TO EXPAND SELECTIONS

Assessment results and information such as questionnaire responses and guidance, can be downloaded as a pdf from the Summary > Reports menu on the left side of the screen.

STEP 5: CONTINUOUS IMPROVEMENT

Use the Advisor to evaluate your program, start internal discussions about optimal program levels, and to set goals. You should update your assessment periodically, at least annually. Peer results change as companies add assessments so check back frequently for updated results.

For questions email: energyadvisor@rila.org.