

Planning an Energy Efficiency Project: Starting with Sales

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Sales and business development personnel are best positioned to understand the client's actual decision, site constraints, and business objectives during scoping. Their early planning work - defining project objectives, identifying resource needs, establishing timelines and budgets - creates the foundation that project managers will later refine. This front-end effort ensures contractual arrangements align with deliverable scope and prevents costly misalignments when execution begins. We emphasise this phase because incomplete or inaccurate planning at contract stage directly affects project delivery success and profitability.

Publication context: This article reflects its publication date. Market prices, program rules, reporting duties and deadlines may have changed. Confirm current official guidance before making a decision.

This is part one of a two-part series on how to maximise your project's success.

Every project, no matter how large or small, needs a project management plan. This document describes how the project will be executed, monitored and controlled through all project stages from initiation to closure.

Much of this work and project development should be completed by the sales or business development personnel responsible for scoping the project with the client and determining the agreed contractual cost and arrangements. Upon contract award this information is passed onto the selected project manager who then has the responsibility to refine the plan, recruit appropriate resources and facilitate project delivery.

This plan details the essential elements of the project including:

Project definition, objectives and what success looks like;

Project start and finish dates;

Work breakdown structure (WBS) including major tasks;

Project milestones and decision gates;

Allocated time for each activity;

Budget for each activity, including expected expenses such as travel and sub-contractors;

Personnel required for each activity. This can be either a nominated individual or generic roles such as senior consultant, director or graduate.

Project people

It is important to obtain resource commitment as soon as possible once the project has been initiated. As noted above, a human resource management plan needs to be developed to identify and document project roles, responsibilities, required skills, reporting relationships and staff management.

If project team members are to be recruited from within the operational or production departments of an organisation, the role description confirming project responsibilities and expected time commitments should be agreed to and signed off by not only the project team member but by their line manager. This ensures that everyone is clear that there will be distractions from daily operational duties and provision made for production coverage if required.

Don't forget about admin

The administration of a project is often overlooked or not adequately allowed for when developing the WBS. Admin and management tasks include timekeeping, client invoicing, review and approval of expenses, recruitment of team members, progress and performance reviews of team members, project meetings and reporting into senior management. Often admin is lumped into the project management activity in the WBS which is quite often taken as a percentage of the equipment cost of the project. Without analysis of the tasks involved, this can lead to an inappropriate allowance being made for these activities.

How we can help?

Northmore Gordon has significant experience in the management of energy savings and capital projects ranging from the implementation of monitoring systems to the installation of major site infrastructures such as boilers, compressors and processing equipment. We have the flexibility to develop a project plan and management structure to suit a client's specific needs either by facilitating the entire process on behalf of the client or supplementing the client's internal resources for the duration of the project.

Using this guidance

Check the site's operating conditions, data quality, project stage and current program settings before turning the dated discussion into a scope or investment decision.

Related guidance

Energy audits

Measurement and verification

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Why should sales or business development personnel complete early project management planning work?

Sales and business development personnel are best positioned to understand the client's actual decision, site constraints, and business objectives during scoping. Their early planning work—defining project objectives, identifying resource needs, establishing timelines and budgets—creates the foundation that project managers will later refine. This front-end effort ensures contractual arrangements align with deliverable scope and prevents costly misalignments when execution begins. We emphasise this phase because incomplete or inaccurate planning at contract stage directly affects project delivery success and profitability.

What is a work breakdown structure (WBS) and why is it essential for energy project planning?

A work breakdown structure organises all project activities into a hierarchy of major tasks and subtasks. For energy projects, this ensures every component—from initial audit through measurement and

verification to reporting—receives allocated time and budget. A comprehensive WBS prevents common oversights like metering installation management, baseline documentation, or commissioning verification. By breaking work into identifiable pieces, the team can assign responsibilities, track progress against milestones, and identify resource conflicts early. We recommend this structured approach to match project complexity and avoid scope creep.

Why are administrative and management tasks often underestimated in energy project budgets?

Administrative work—timekeeping, invoicing, expense approval, team recruitment, progress reviews, project meetings, and management reporting—is frequently lumped into a single project management line as a percentage of equipment costs. This approach ignores the actual effort these tasks demand. Energy projects require detailed coordination across multiple stakeholders, documentation of evidence for compliance or certificates, and careful tracking of technical decisions. Without granular analysis of admin requirements, budgets become inadequate, delivering either project delays or uncompensated work. We address this by explicitly identifying and costing administrative activities in the work breakdown structure.

What should a human resource management plan address for energy projects?

A human resource plan identifies project roles, required skills, reporting relationships, and staff management arrangements. For energy projects, this means specifying who owns decisions at each stage—from initial assessment through procurement and performance verification. When team members are recruited from operational departments, role descriptions and time commitments must be formally agreed with both the individual and their line manager, acknowledging that project work will compete with daily operations. Clear accountability and realistic resource allocation prevent misunderstandings and ensure continuity through project phases. We emphasise explicit role definition to support successful delivery.

How should resource commitment be obtained and documented when initiating an energy project?

Resource commitment should be secured as soon as a project is initiated, with specific individuals or roles identified and their availability confirmed. When personnel come from internal departments, a signed agreement between the team member, their line manager, and the project should document responsibilities, time allocation, and any production-coverage arrangements needed during their absence. This formal approach clarifies expectations and protects the project from last-minute resource withdrawals. For larger teams or external resources, similar documentation ensures everyone understands their role in the delivery approach. We recommend this practice to avoid resource conflicts that delay assessments or implementation.

What is the relationship between the sales phase and project management phase in energy projects?

The sales phase focuses on understanding the client's decision, business problem, and site constraints while developing a project scope and commercial proposal. Upon contract award, this planning information transfers to the project manager, who refines schedules, confirms resource availability, and manages execution. Sales work that accurately captures site conditions, stakeholder roles, and decision requirements allows the project manager to start efficiently. Incomplete sales planning forces the project manager to re-scope or re-negotiate during delivery, creating delays and cost overruns. We structure our engagement approach to ensure thorough upfront work by sales aligns with project delivery requirements.

What does project success look like in an energy efficiency project, and why should it be defined at the planning stage?

Project success encompasses achieving the defined objectives—which might include identifying savings opportunities, obtaining certificates, delivering measurement and verification, or securing

funding—within agreed timelines and budgets. Success criteria must be established during planning because they guide resource allocation, scope management, and performance reviews. For energy projects, success might mean verified savings, approved investment cases, or certificate issuance, depending on the client's business decision. Defining success early prevents scope creep and allows the team to make trade-off decisions aligned with client priorities. We emphasise clarity on success metrics to focus delivery efforts.

How should energy projects with multiple sites or complex stakeholders be approached in the planning phase?

Multi-site or complex projects require explicit definition of assessment boundaries, decision ownership at each stage, and coordination protocols across departments or facilities. The work breakdown structure should reflect site-specific assessments while identifying common activities such as reporting frameworks or funding pathway evaluation. The human resource plan must clarify who represents each stakeholder and how decisions will be approved. Project milestones should mark completion of critical activities that unlock subsequent work. Our six-stage delivery approach—Assess, Build the Case, Capture Value, Deliver, Procure, and Perform—provides a structure for managing this complexity across multiple sites or stakeholder groups.