greentek
Cold Chain Systems

EnergyFlow

greenTek's complete business management platform

Managing the full project lifecycle from opportunity to verified savings

Presented by Trade-Tech TRADE TECH

THE PRODUCT VISION

One connected platform for every stage of the project

EnergyFlow gives greenTek a consistent process for evaluating, delivering, measuring, and managing energy-performance projects.

Standardize how opportunities and projects are evaluated

Keep customer, technical, installation, and performance information connected

Give leadership visibility from the first lead through verified savings

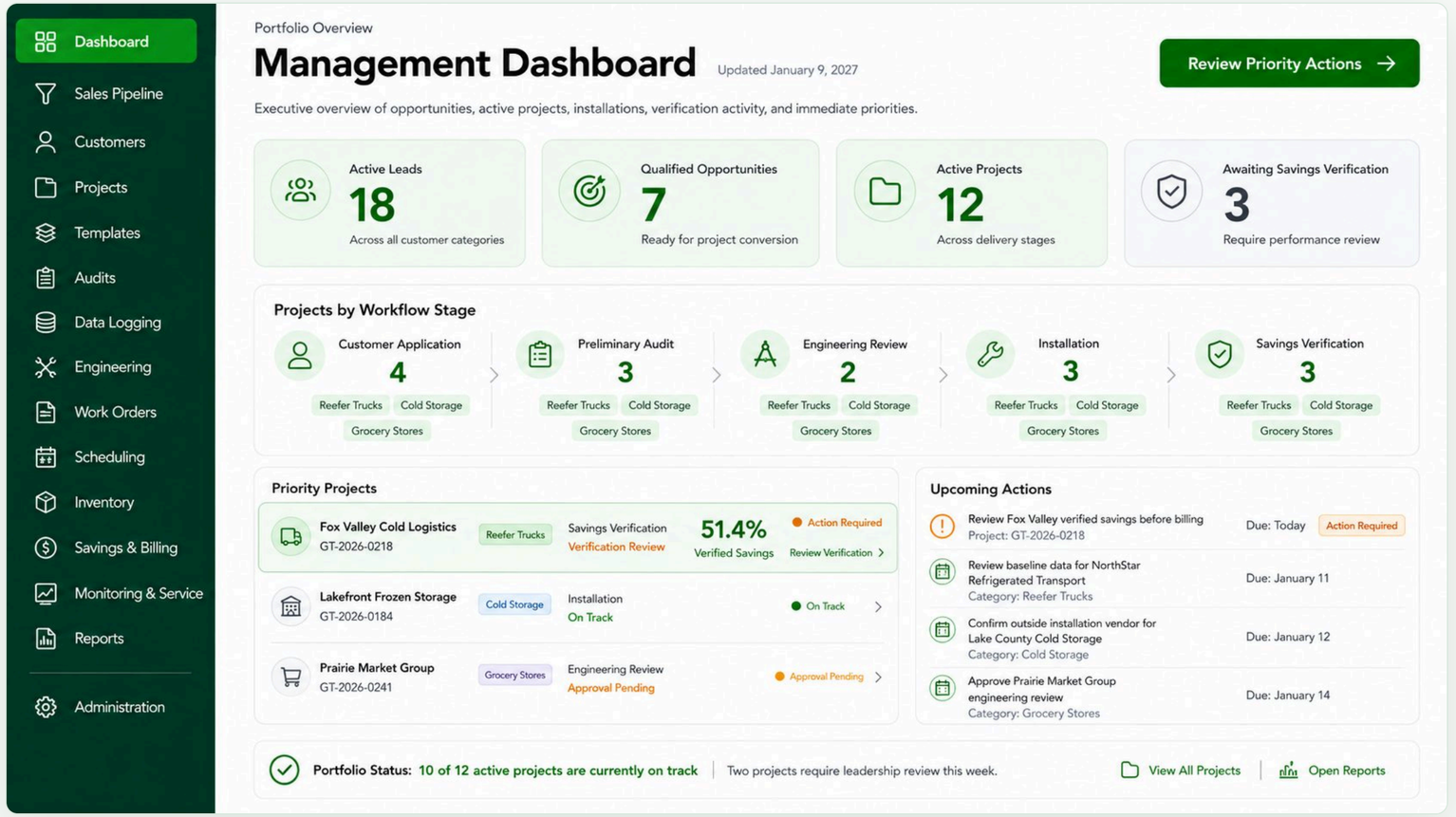
Configure → Qualify → Design → Install → Verify → Manage

EXECUTIVE VISIBILITY

Leadership sees the entire portfolio at a glance

EnergyFlow brings opportunities, active projects, installations, verification activity, and priority actions into one simple view.

- Fox Valley Cold Logistics in the Savings Verification stage
- 51.4% verified savings, visible without digging
- Priority actions across multiple customer categories



STAGE 01 · CONFIGURE

The workflow adapts to each customer category

EnergyFlow begins with reusable templates that define how each type of project should be evaluated and delivered.

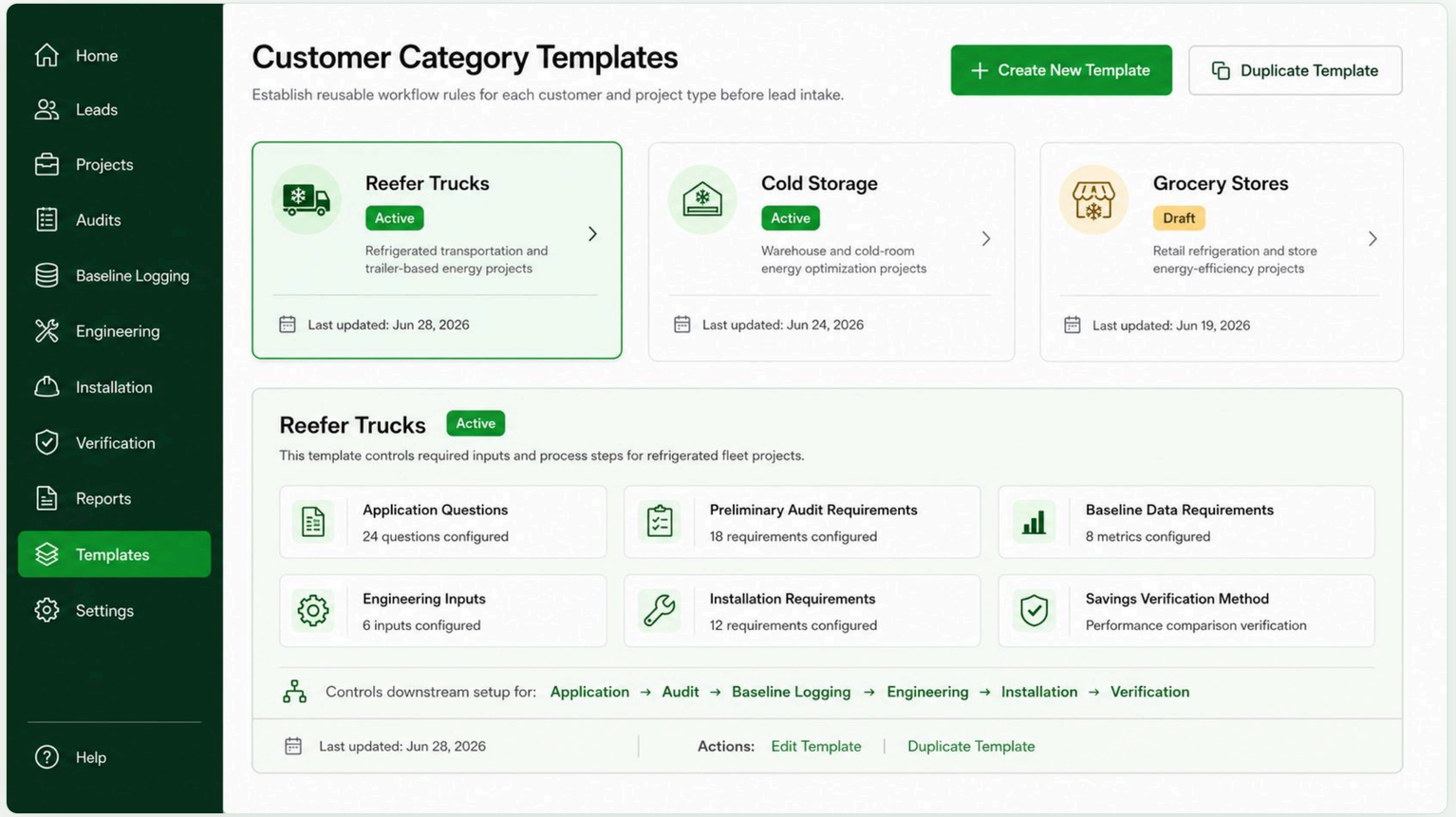
Reefer Trucks

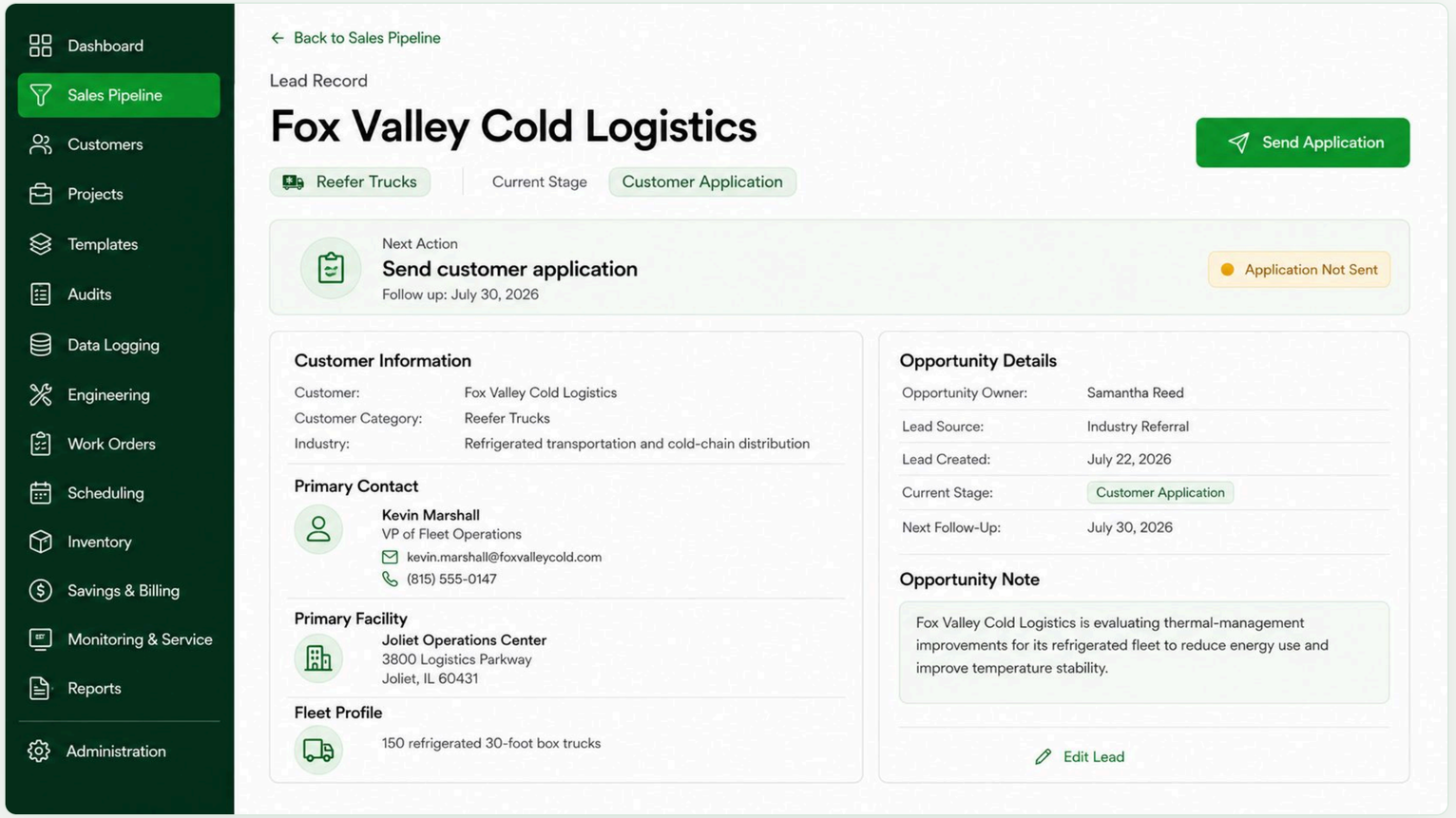
Cold Storage

Grocery Stores

Each template controls application questions, audit requirements, baseline data, engineering inputs, installation requirements, and the savings-verification methodology.

greenTek never rebuilds the workflow for a new customer.





STAGE 02 · LEAD GENERATION

Every opportunity begins with a clear customer record

EnergyFlow establishes the core information that will remain connected throughout the project lifecycle.

- Customer and category
- Primary contact and facility
- Fleet profile
- Opportunity owner
- Current stage
- Next action

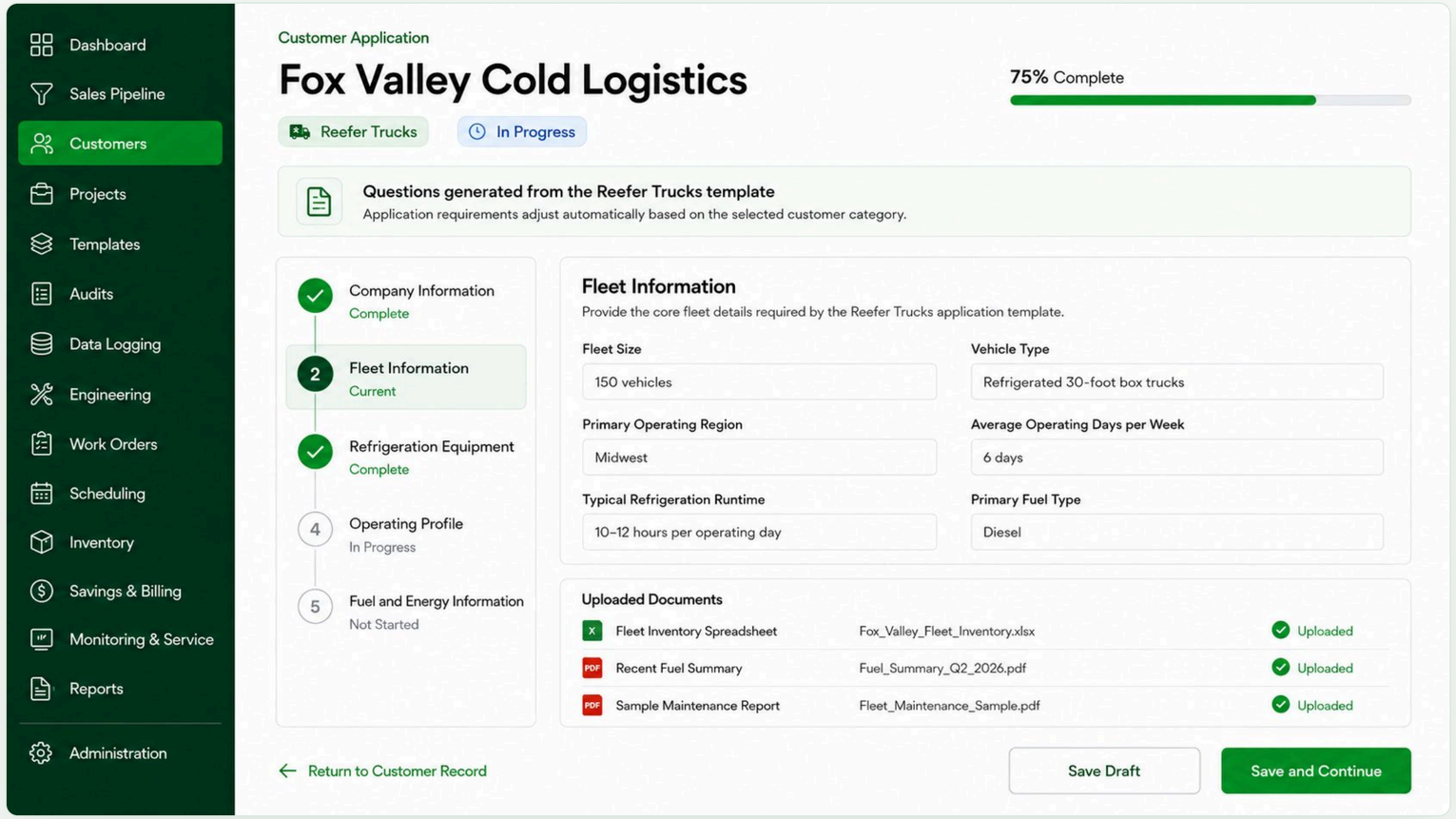
Information entered once continues through every later stage.

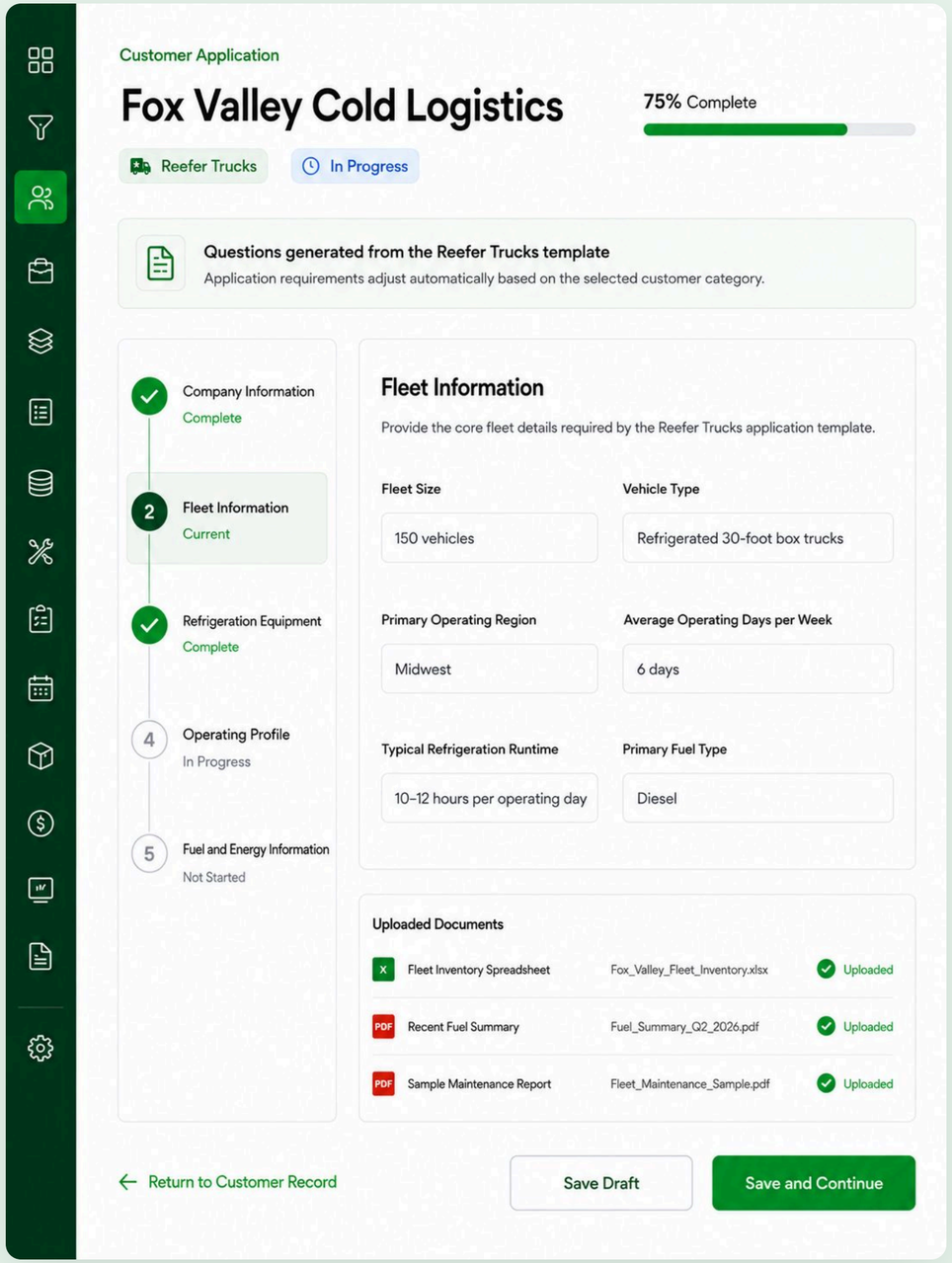
STAGE 03 · CUSTOMER APPLICATION

The right questions are generated automatically

Fox Valley's application is created from the Reefer Trucks template, ensuring greenTek collects the right information from the beginning.

- Guided application sections
- Completion tracking
- Representative fleet information
- Uploaded supporting documents
- Category-specific questions



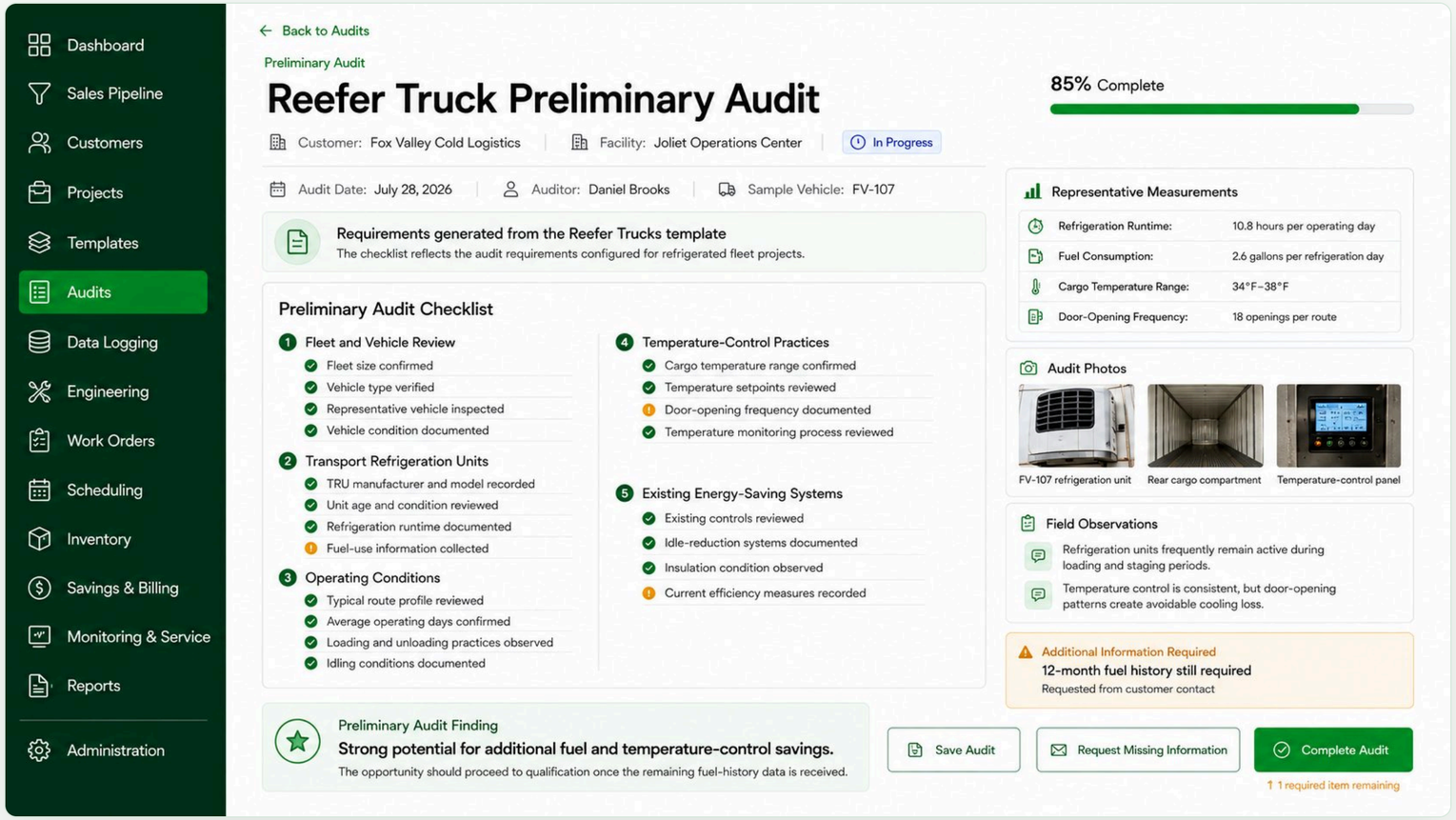


MOBILE-FRIENDLY EXPERIENCE

The same workflow remains accessible in the field

Customers and project stakeholders can complete or review EnergyFlow information from a mobile-friendly interface.

- Simple section-by-section completion
- Consistent information across devices
- No separate field process
- Less reliance on paper or disconnected spreadsheets



STAGE 04 · PRELIMINARY AUDIT

Field assessments follow a consistent process

EnergyFlow uses category-specific requirements to guide what greenTek reviews, measures, photographs, and documents during the preliminary audit.

- Template-generated audit checklist
- Representative measurements and audit photos
- Field observations
- Missing-information tracking
- Preliminary opportunity finding

The system captures what is complete and what is still required.

STAGE 05 · QUALIFICATION

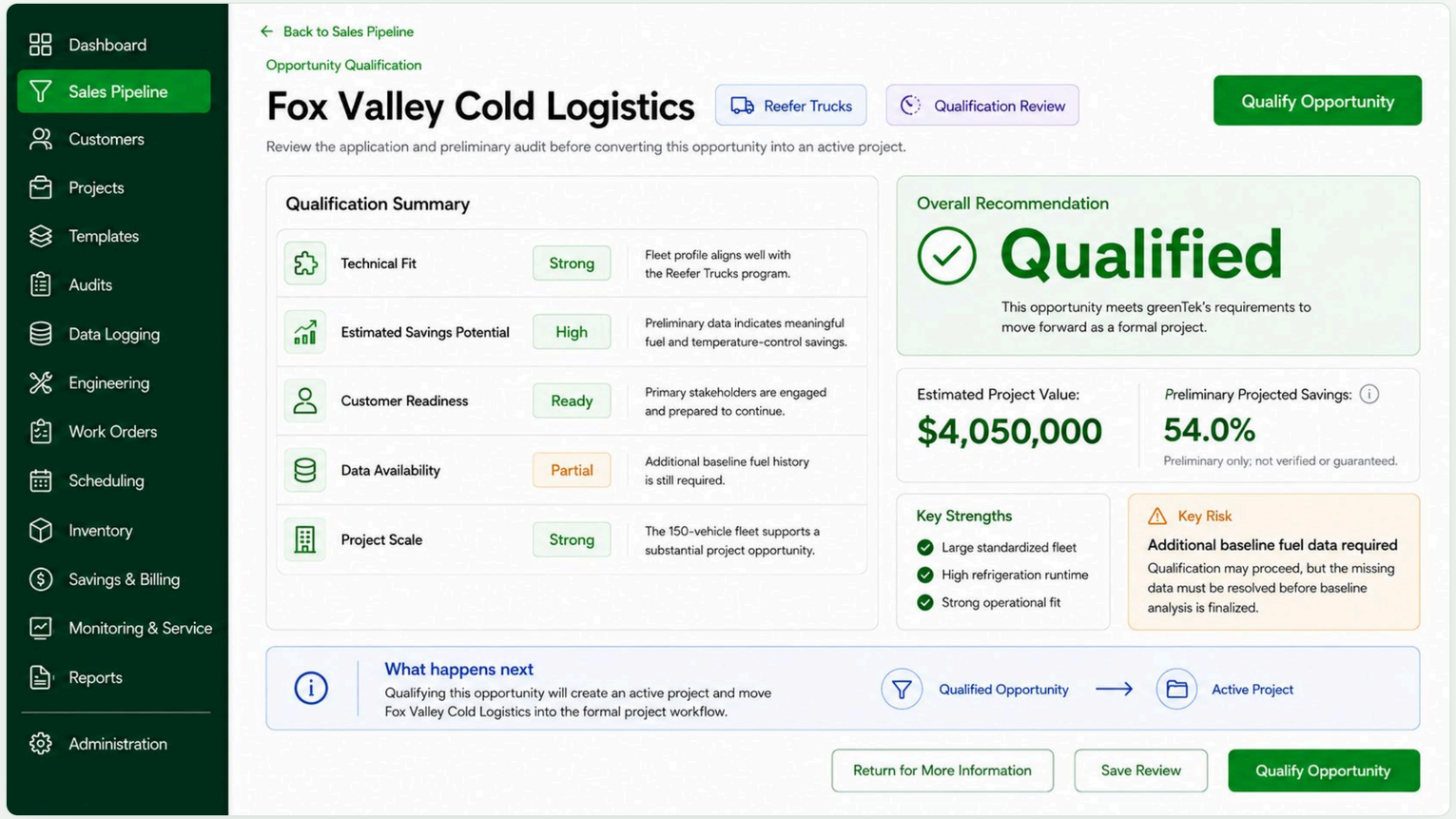
greenTek can make a clear decision before committing resources

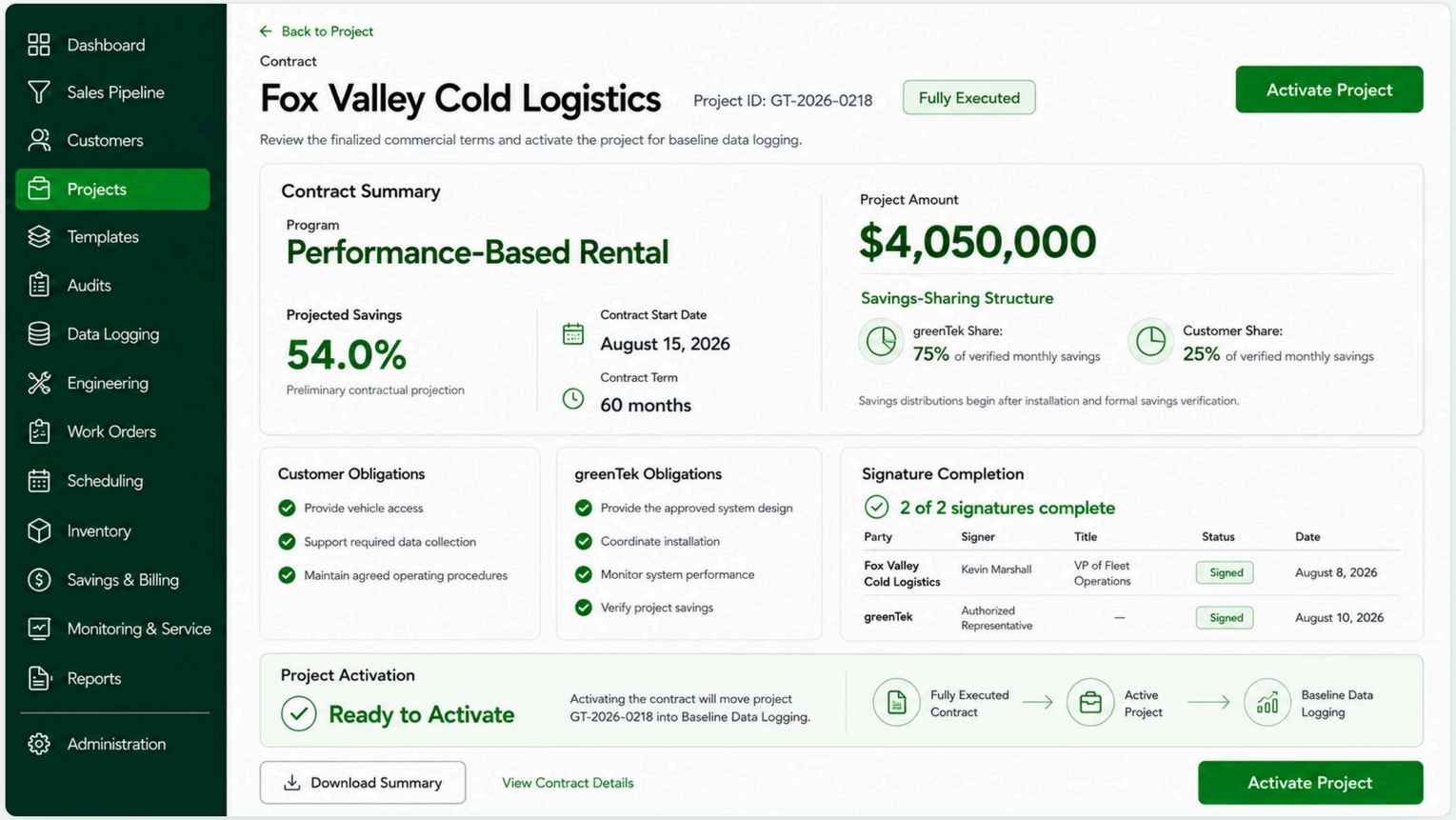
EnergyFlow summarizes application and audit information into one consistent qualification review.

- Technical Fit
- Estimated Savings Potential
- Customer Readiness
- Data Availability
- Project Scale

RESULT: QUALIFIED

Qualification converts the opportunity into a formal project.





STAGE 06 · CONTRACT

Approved commercial terms activate the formal project

EnergyFlow summarizes the agreement, responsibilities, projected results, signature status, and readiness to begin delivery.

- Performance-Based Rental structure
- Projected savings and savings-sharing structure
- Customer and greenTek obligations
- Completed signatures
- Ready-to-activate status

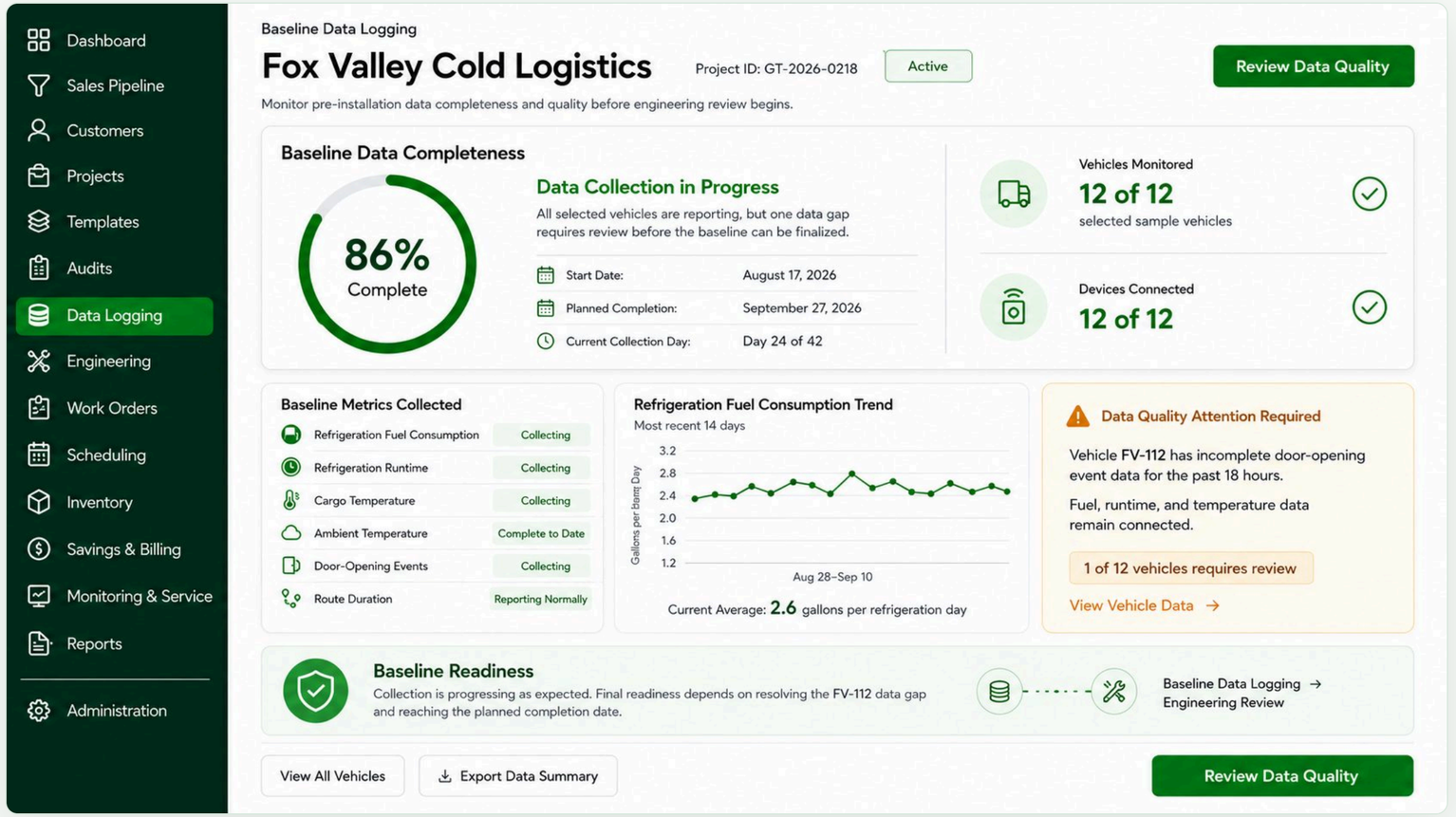
STAGE 07 · BASELINE DATA

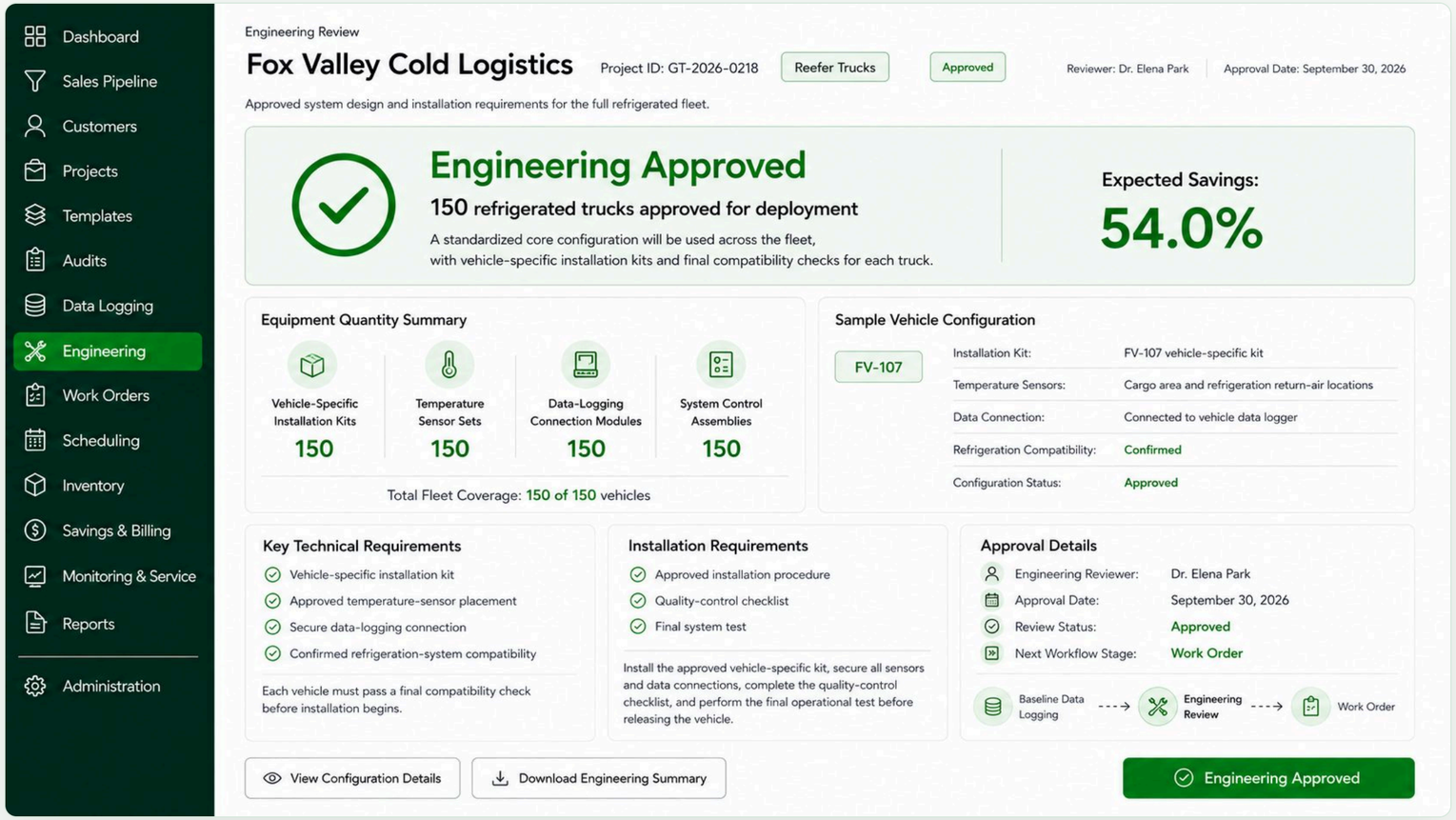
Reliable savings begin with a reliable baseline

EnergyFlow helps greenTek determine whether enough complete and trustworthy pre-installation data is being collected.

Is enough reliable baseline data being collected to proceed?

- Data completeness across vehicles and connected devices
- Baseline metrics and performance trend
- Vehicle-level data-quality alert
- Readiness for engineering review





STAGE 08 · ENGINEERING REVIEW

Field data becomes an approved system configuration

EnergyFlow gives greenTek engineering one clear place to approve equipment quantities, vehicle-specific requirements, and installation standards.

- Approved configuration for 150 refrigerated trucks
- Equipment quantities and vehicle-specific requirements
- Temperature-sensor placement and data-logging connection
- Installation and testing requirements
- Approved engineering status

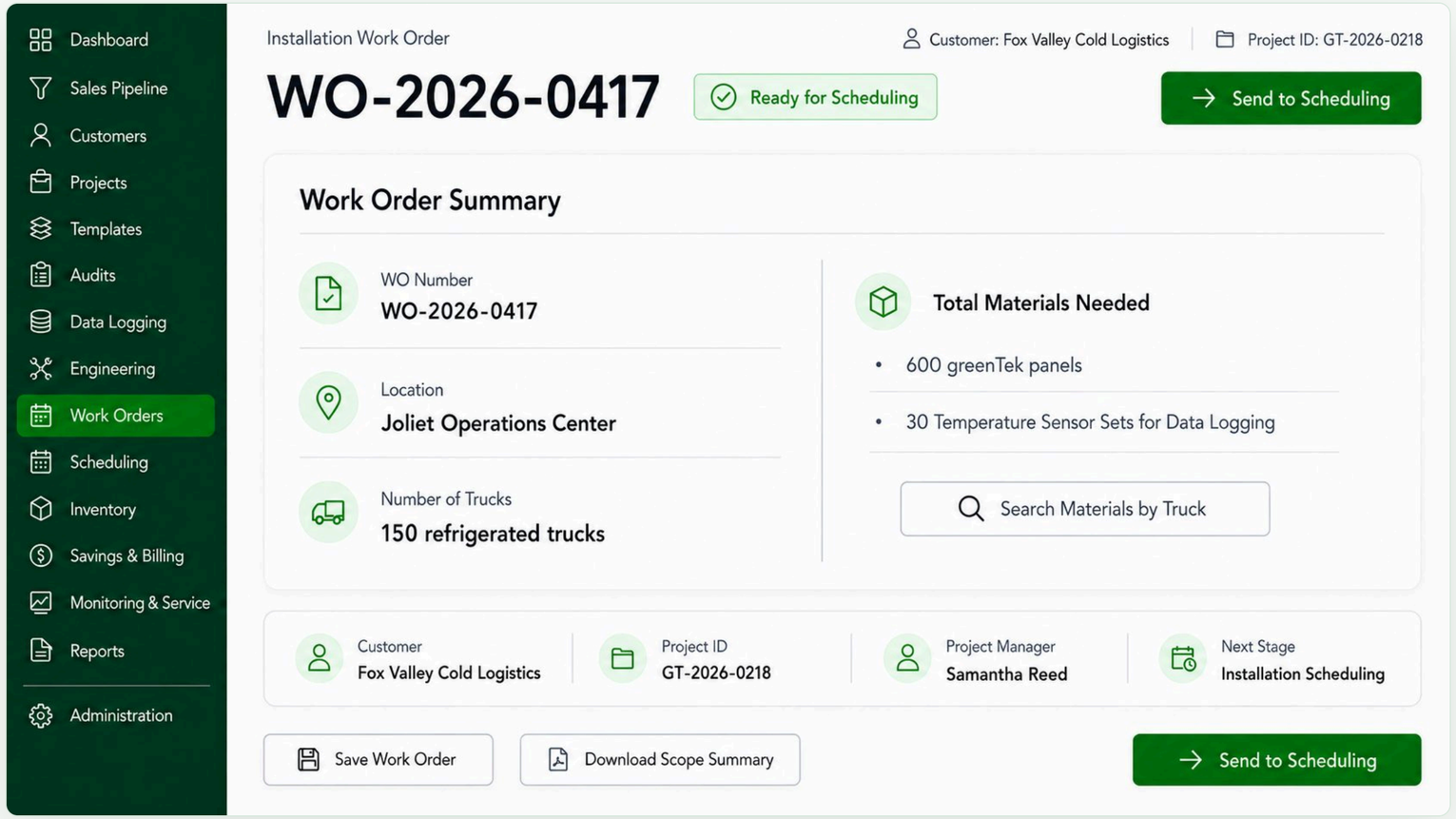
STAGE 09 · WORK ORDER

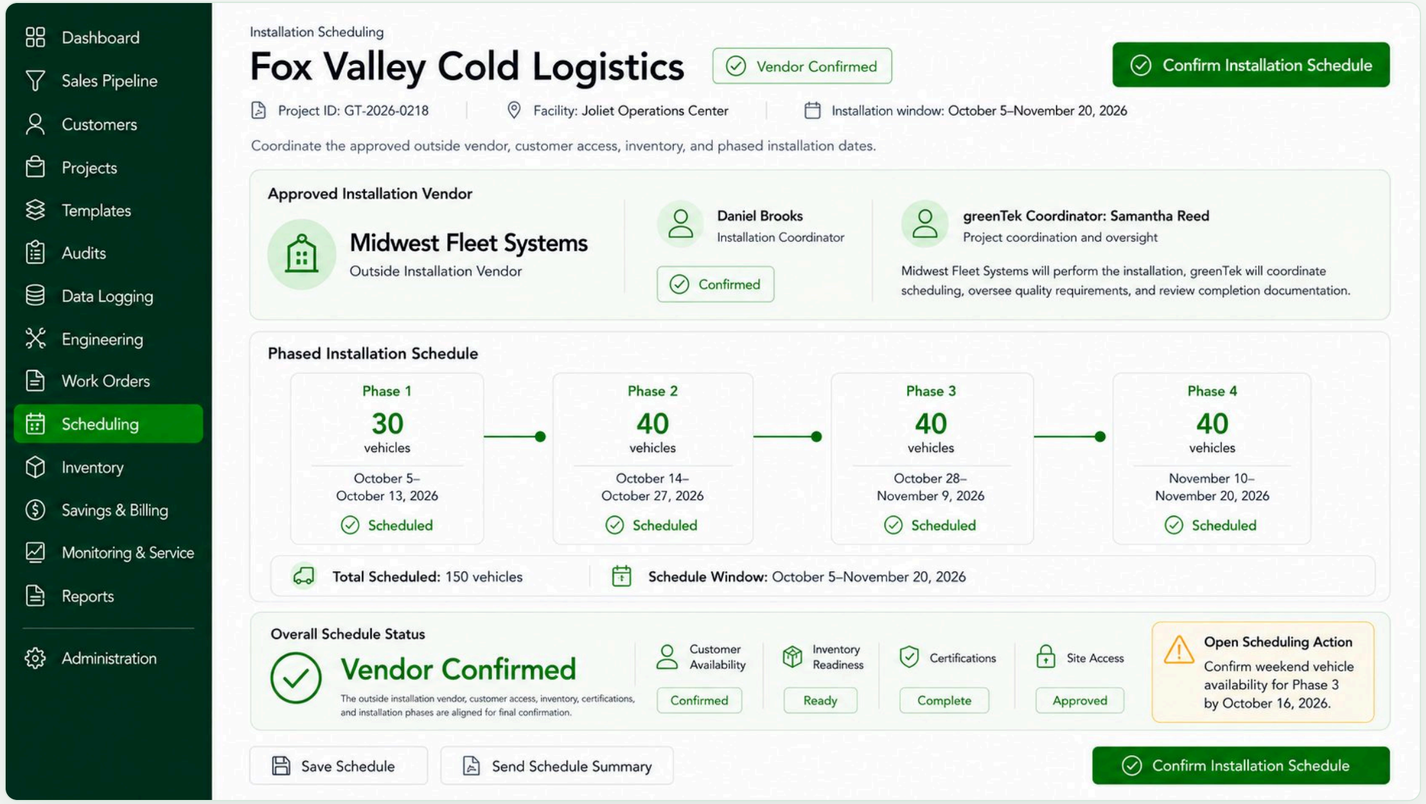
The approved design becomes a clear scope of work

EnergyFlow translates engineering requirements into a structured work order for the outside installation vendor.

- Work-order number, customer, and project ID
- Location and vehicle count
- Total materials needed, searchable by truck
- Assigned project manager
- Ready-for-scheduling status and next stage

A controlled handoff from engineering into installation operations.





STAGE 10 · SCHEDULING

greenTek coordinates the work without becoming the installation crew

EnergyFlow aligns the approved outside vendor, customer access, inventory, certifications, and phased installation dates.

Midwest Fleet Systems performs the installation

greenTek coordinates and oversees the project

Fox Valley provides vehicle and facility access

Four phased installation periods · Vendor confirmation · Inventory readiness · Certifications · Site access · One remaining scheduling action

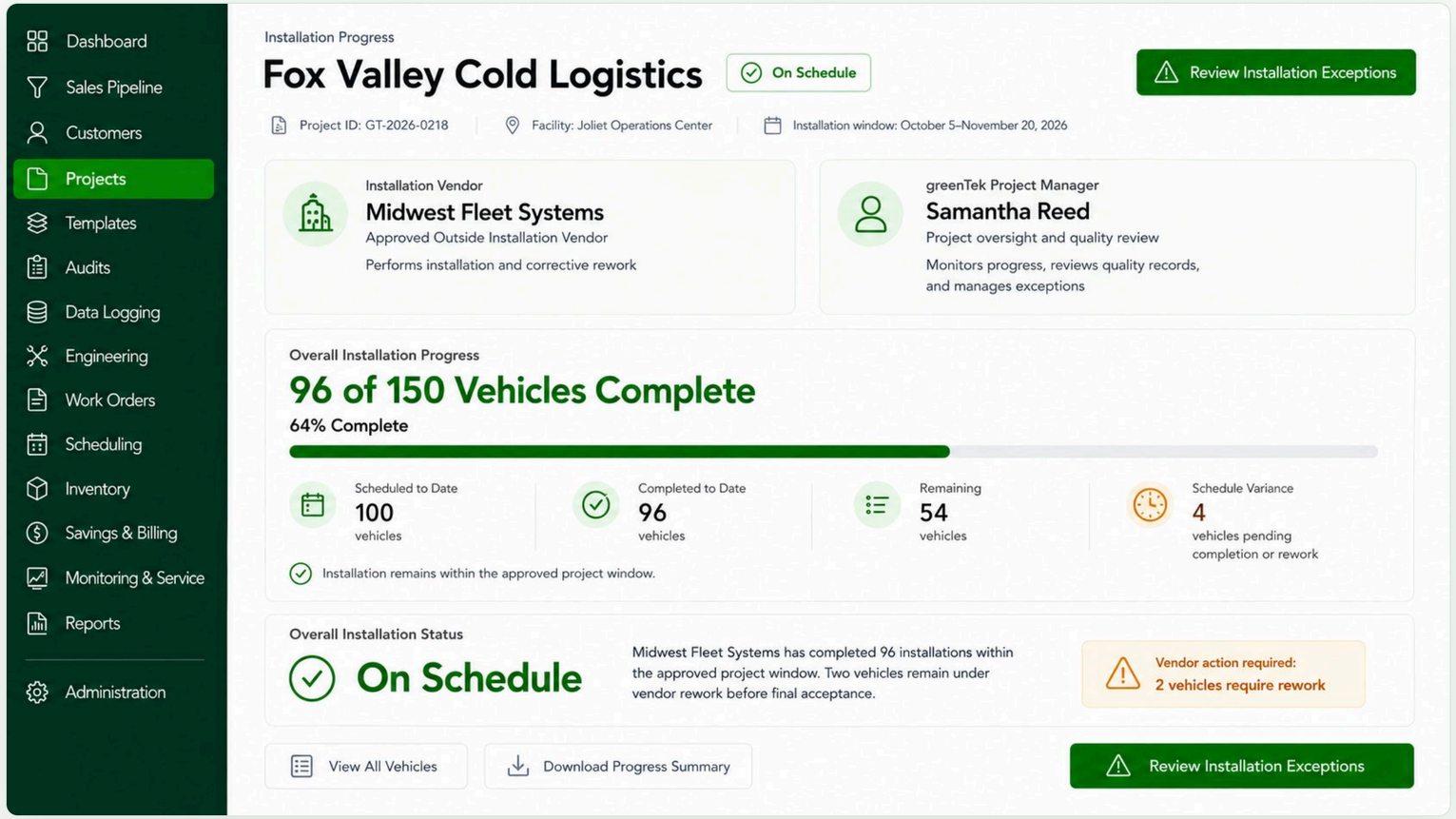
STAGE 11 · INSTALLATION

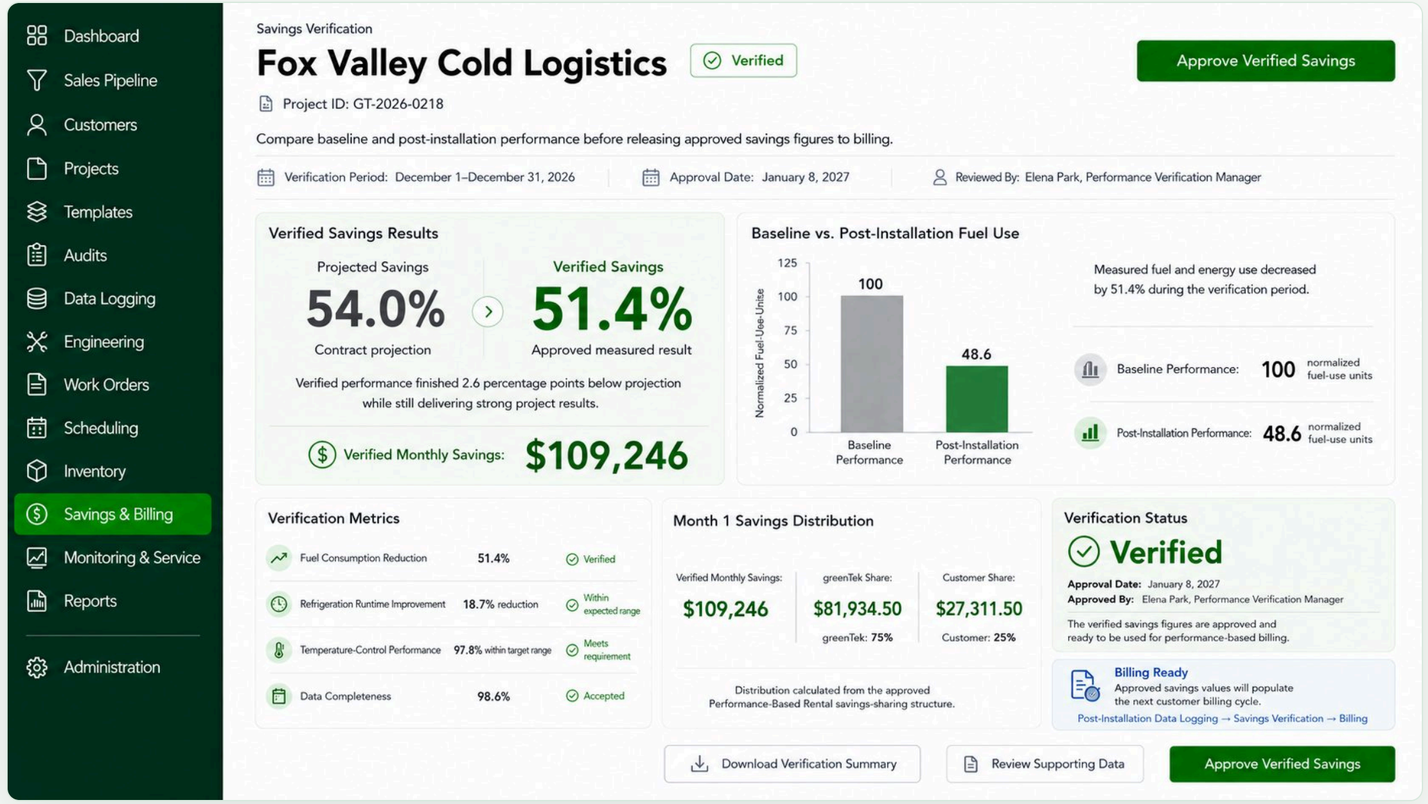
Progress, quality, and vendor accountability stay visible

EnergyFlow helps greenTek oversee the outside vendor's progress, documentation, quality checks, and rework exceptions.

- 96 of 150 vehicles complete — On Schedule
- Scheduled versus completed vehicles
- Outside installation vendor with greenTek quality oversight
- Two vehicles requiring rework, tracked as exceptions

greenTek oversees quality and delivery without acting as the labor provider.





STAGE 12 · SAVINGS VERIFICATION

Operational results become clear financial outcomes

EnergyFlow compares baseline and post-installation performance and creates an authoritative savings result for billing.

54.0%
Projected savings

51.4%
Verified savings

$109,246
Verified monthly savings

- Baseline versus post-installation comparison
- greenTek and customer Month 1 shares
- Verified and billing-ready status

Approved savings figures become the basis for performance-based billing.

HOW AI STRENGTHENS ENERGYFLOW

AI can reduce administrative effort while improving consistency

AI can support greenTek's team throughout the EnergyFlow workflow while keeping final decisions and approvals with greenTek.

Application and document review

Identify missing information, conflicting values, and follow-up needs.

Qualification assistance

Summarize applications and audits into a consistent recommendation.

Baseline and savings analysis

Detect data gaps, anomalies, and meaningful performance changes.

Installation quality review

Review photos, serial numbers, test results, and exception reports.

Automated project coordination

Recommend next actions, prepare reminders, and support workflow handoffs.

AI supports greenTek's team; final approvals remain with greenTek.

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EnergyFlow creates one connected process from opportunity to verified savings

Standardized workflows across customer categories

Clear accountability across greenTek, customers, and outside vendors

Verified results connected directly to project and billing decisions

Built around the way greenTek evaluates, delivers, and manages energy-performance projects

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