



TRIO™

Smooth Switch, Stronger Results: A Practical Guide to  
Transitioning Energy and Data Advisors with Confidence

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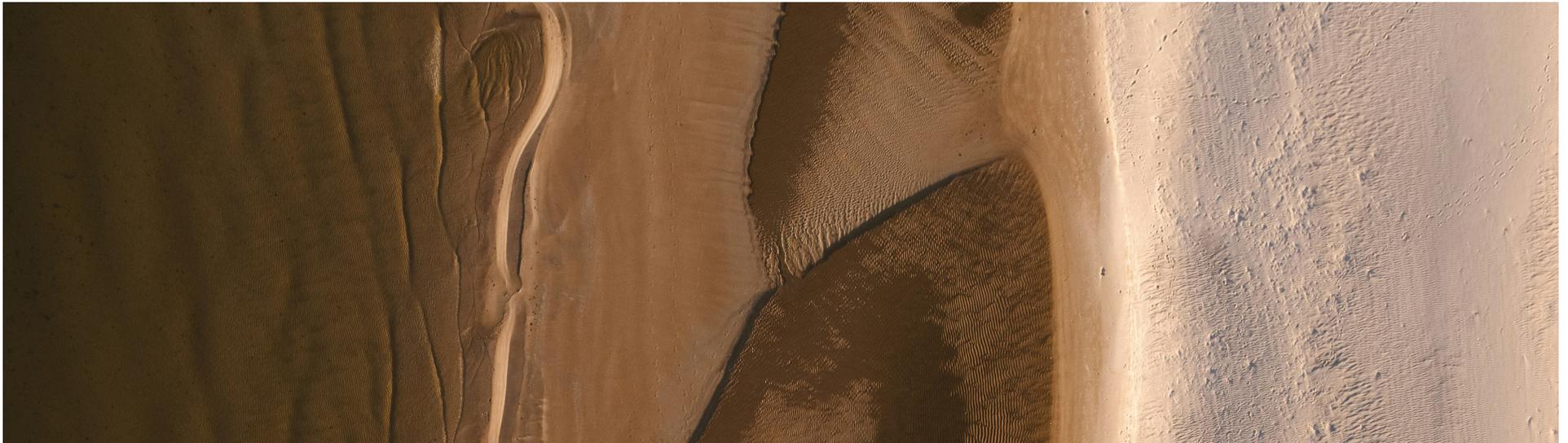
# Introduction

Switching energy advisors can feel like a daunting task. The idea of upending established processes, chasing down invoices, and educating internal stakeholders can make even the most well-intentioned transition feel like a risk. And understandably so – no one wants to be responsible for delays, billing mishaps, or gaps in reporting that reflect poorly across the organization.

At Trio, we've helped global enterprises navigate this change with confidence. The key? A transition process that's deliberately structured to reduce friction, minimize internal effort, and mitigate risk.

Together with our partners, we leverage AI-enabled systems that streamline data capture, validation, and reporting, ensuring every transition is both human-centered and technologically precise.

Whether you're thinking about moving away from your current vendor or you've already made the decision, this guide walks you through what to expect – and how Trio ensures your transition is smooth, secure, and successful.



An aerial photograph of a vast, grassy mountain range. A prominent ridge runs diagonally across the frame, covered in golden-brown grass. A narrow, light-colored dirt path winds along the crest of the ridge. A small, dark silhouette of a person is visible on the path, providing a sense of scale. The sky is filled with soft, grey clouds, and the overall lighting is warm and atmospheric.

Impact. Together.

# What Clients Really Worry About (and How We Solve It)

When organizations consider transitioning energy advisors, the top concerns typically fall into two categories →

**Time commitment**  
How intensive will this transition be for our internal team?

**Risk of disruption**  
What are the potential risks to our internal credibility or business continuity during the transition?

Here's how we've designed our process around those concerns:

## Concern

Time commitment

## Trio's Solution

- Your team invests roughly 3–5 hours per week\*.
- We do the rest – driving the process, collecting data, coordinating stakeholders, and building the strategy.

Risk of disruption

- Our phased process is designed for data continuity and complete billing.
- We work behind the scenes to prevent issues before they arise, protecting your internal credibility and external performance.

\* This weekly average reflects effort across five phases. Most of your team's time will be concentrated at the bookends (Phases 0–1 for planning and transition, and Phase 4 for activation). Trio leads the bulk of the work in Phases 2–3, where knowledge transfer and strategy build are the primary focus.

# A Phased Approach That Works

At Trio, we've developed a five-phase transition methodology that simplifies what might otherwise feel like a complex change.

Each phase is designed to move forward confidently without overwhelming your team or disrupting day-to-day operations. Importantly, we build in flexibility – sometimes there's overlap with an existing provider, other times we step in the day their role ends. Either way, your account is actively managed from day one.

- Phase 0  
Planning
- Phase 1  
Transition Set-Up
- Phase 2  
Knowledge Transfer
- Phase 3  
Strategy Build
- Phase 4  
Activation & Execution



# A Phased Approach That Works

## Phase 0: Planning →

We align on goals, finalize the site list, identify your internal stakeholders, and establish a transition timeline. A single kickoff meeting sets everything in motion. From the start, we adapt the plan to fit your circumstances – whether that means coordinating alongside an incumbent advisor or preparing to take over seamlessly when their engagement ends.

## Phase 3: Strategy Build →

Our team works in the background to build a custom procurement and risk strategy. This includes historical data modeling and reporting tool configuration – supported by AI-driven validation tools from our partners that improve data accuracy, audit invoices, and reduce manual review time – all reviewed with you before finalization.

## Phase 1: Transition Set-Up →

We gather the necessary data, execute Letters of Authorization (LOAs), and assess existing contracts. Urgent items (like near-term renewals or at-risk contracts) are prioritized immediately.

## Phase 4: Activation & Execution

We put your approved strategy and tools into full operation – bill management systems, reporting dashboards, data feeds – while beginning continued performance monitoring. Whether overlapping with an incumbent or starting fresh, you'll have a fully functional system, defined KPIs, and a dedicated team actively managing execution.

## Phase 2: Knowledge Transfer →

Stakeholders are brought up to speed through targeted education sessions – covering energy markets, procurement best practices, and sustainability strategy. Simultaneously, we prepare your systems and reporting cadence.

# Risk and Mitigants

## Risk Category

Data Migration & Integrity

System & Process Misalignment

Energy Bill Validation

Stakeholder Confusion

Change Fatigue

Business Continuity

Subcontractor management

## Specific Risk

Missing/incomplete history, lost invoice images, mismatched formats

ERP/AP file format mismatches; failed uploads; coding errors

Wrong account numbers, addresses, tax exemptions missed

Internal teams unclear on workflows, points of contact, escalation paths

Overlap of old/new providers overwhelms AP & energy staff

Missed payments for critical sites; operational disruption

Monitoring performance; alignment of priorities; miscommunication

## Mitigants / Best Practices

Validate migrated data side-by-side; conduct 3-month historical audit; leverage machine learning-based data normalization (via partners like Cass Information Systems) to improve accuracy

Test AP uploads pre-cutover; reconcile trial runs; align GL coding prior to transition

Perform account validation audit; confirm tariff/tax setups before first billing cycle; use AI-powered capture and verification tools to ensure >99% accuracy

Create RACI map; run transition steering calls; publish new contact matrix

Stagger training; provide user guides; simplify workflows where possible

Flag high-priority sites for monitoring; add SLA credits for late fees; weekly transition reviews; proactive missing bill research

Robust subcontractor management program to “audit the auditor”



# What You See vs. What We Do

Transparency is core to our onboarding process.

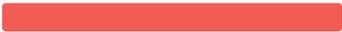
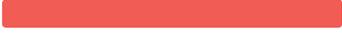
While you'll experience a simple, structured process with a clear point of contact, our team will be managing dozens of technical and strategic details behind the scenes to keep things running smoothly.

Behind the scenes, our platform integrates intelligent automation – from invoice scanning and categorization to anomaly detection – ensuring faster, cleaner data flow with fewer manual touchpoints.

	What you see	Behind the scenes
→ Phase 0 Planning	Kick-off meeting	Data validation, stakeholder coordination, timeline buildout
→ Phase 1 Transition Set-Up	Weekly check-ins	LOA execution, account and contract reviews
→ Phase 2 Knowledge Transfer	Stakeholder sessions	Reporting logic design, platform setup
→ Phase 3 Strategy Build	Strategy workshop	Market analysis, financial modeling, risk evaluation
→ Phase 4 Activation & Execution	Dashboards & KPI reviews	System integrations, billing validation, proactive monitoring

# Real Results, Real Experience

We've guided numerous global organizations through successful transitions. Here's a snapshot:

Client	Complexity	Transition Duration	Accounts Managed
Bridgestone	 High	 6–9 months	2,240 sites / 16,200 accounts
Fortune 500 Global Manufacturer and Plastics Packaging Marketer	 High	 6 months	149 sites / 1,740 accounts
French Holding Company	 High	 4 months	Multiple and fluid sites across 14 countries
Fortune 500 Building Materials Manufacturer	 Medium	 5 months	47 sites / 320 accounts

Each engagement involved distinct market conditions, business needs, and internal structures – but all delivered improved visibility, stronger alignment, and measurable cost savings.

# Don't Just Take Our Word for It



“

“Trio’s advisory team went above and beyond to truly understand the intricacies of our complex businesses that they are supporting. They were always curious and respectful and had a willingness to understand. The team was also very patient - educating internal stakeholders that had varying degrees of knowledge on how the energy markets work. The ability to customize a strategy to our business that didn’t feel “cookie cutter” or inflexible was imperative to our company which is one of the reasons we chose Trio to partner with.”

Director of Global Procurement Ops,  
Fortune 500 Building Materials Manufacturer

“

“ Since beginning our transition with Trio in the summer of 2023, I’ve been extremely pleased with the high degree of customization for energy strategies and the high level of responsiveness and brainstorming. Bridgestone has definitely benefited from our new partnership with Trio and we are very happy with the high level of detail and attentiveness to our needs.”

Matt Myers,  
Sustainability Procurement Specialist, Bridgestone

## Recognized by Bridgestone for Outstanding Service

Bridgestone Americas recently honored Trio through its Supplier Recognition Program for Outstanding Service – acknowledging our role as a trusted partner in helping advance energy efficiency, data accuracy, and sustainability outcomes.

“

“All of our award recipients are valued partners who contribute greatly, not only to our business but also in helping us deliver on our commitments to serve society and shape a more sustainable future of mobility.”

— Bridgestone Americas Supplier Recognition Announcement

# You're Not Just Switching Advisors – You're Gaining a Strategic Partner

This isn't just a process handoff, it's a partnership that equips you with a:

## Flexible Process

Maintaining business continuity

## 100%

On-time onboarding record

## Dedicated

Senior-led team to guide you every step of the way

Turning a complex process into a smooth experience.

### Smart Technology, Human Expertise

Trio's transition model combines the best of both worlds: deep human expertise and the intelligent automation capabilities of our UBM partners. Together, we apply advanced AI and data-capture technologies to simplify onboarding, eliminate manual reconciliation, and give clients confidence in every number.



# Let's Make Your Transition Seamless

If you're considering a switch, start by having a conversation. We'll show you exactly what the process will look like for your team – and how quickly we can start delivering value.

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Book a consultation with our team [here](#).



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