

Solution Overview

Utility Account Opening and Closing Transition Services

Avoid delays and unexpected shutoffs. We work directly with utilities on your behalf to ensure that critical services are set-up properly and turned on when expected.

Our Typical Client

- Multi-site, corporate or franchisee businesses expanding at a rapid pace.
- Senior team members on the real estate or account teams.
- Commercial real estate firms.
- Acquiring new locations, expanding into new locations, new construction, or divesting properties.

Industries that Often Need Account Transition Services

- Retail stores and restaurants.
- Car washes and other automotive services.
- Veterinary, dental, and medical practices.
- Storage unit facilities.
- Banking institutions.

Our Clients Seek Help with These Key Challenges

- Relieving overburdened accounting or real estate team resources.
- Avoiding revenue loss due to delayed utility openings or unverified closed accounts.
- Taking the pressure off overwhelmed accounting or real estate team members.

Why Choose Our Utility Account Transition Team?

- Speed, accuracy, expertise, and verification.
- Experienced, stable team with established utility company relationships.
- Tech-enabled process with full visibility of each account's status.

Core Services

- Begin and end services according to your project plan.
- Name and Tax ID changes.
- Negotiate to waive or lower account opening deposits.
- Identify best rate class for your business needs.
- Verify completion of open and close.
- Review first and final invoices for accuracy.

New Construction

- Verify that the city/town/county receives proper permits.
- Coordinate meetings between utility, engineers, and client until all design and installation phases are completed.
- Follow up with all parties to facilitate the installation of new meters before permits expire.
- Liaison between client and utility if site visits are required.

Energy Services Results

Below are examples of our work in utility account opening and closing transition services.

> [Panda Express Restaurants](#)

New Construction Locations Hit Target Opening Dates for 100+ with Utility Connection Services

- Building 100+ freestanding restaurants.
- Provided early site assessment and planning.
- Provided effective project management, communication, and documentation.
- Helped to coordinate efforts between utility vendors and general contractors.
- Streamlined installations and made it easier to deliver projects on time.

> [Private-Equity Owned Fortune 500 Discount Retailer](#)

Avoided \$6.75MM in Lost Revenue with a Better Utility Transfer Process

- Rapidly growing with 1,000 new store openings per year.
- The client was missing utility turnover deadlines and shutoffs were occurring frequently having a direct, negative effect on EBITDA.
- Managed the utilities transfer process and ensured that stores remained open and that all new accounts were set up properly in the client's system.
- Reduced # of stores getting closed due to utility shut off from 80 to 5 in the first year.
- Prevented loss of refrigerated and frozen inventory and ensured that stores remained up and operating—enabling them to avoid lost revenue.

> [Storage Unit Developer](#)

Transferred 188 Utility Accounts in Seven Days

- Developer needed to complete 188 utility account transitions for newly acquired storage facilities.
- Lacked internal resources for negotiating utility rate structures, managing documentation, and navigating legal requirements.
- Enabled our client to avoid costly delays and service disruptions that could negatively affect their storage unit customers and bottom line.

Our Clients

Representative sample of clients who have received utility account opening and closing transition services.

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518.798.4437

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