



Practical Advice for Effective Cross-Departmental Participation And For Getting Top-Level Support When You Need It

This article is drawn from two blog posts that appeared on the CSV Project website in April and May, 2017, by Jill Cliburn and program assistant Craig Hibberd. These blog posts sparked a lot of discussion and led to a training module that was first presented at the CSV Project Procurements, Programs and Pricing Workshop in June. An accompanying [Resource List](#) is available from the CSV Project Solutions Toolkit. Additional resources are under development.

Cross-departmental collaboration. It's a thread that runs through CSV's recommended community solar program-design process, from sharing cross-departmental market research to checking in with the IT department early, to engage them in figuring out which pricing and billing strategies would work best, to working closely with utility planners on a stream-lined economic analysis that gets everyone to Yes. Utility-led community solar programs require participation from people across many utility departments or work groups. And, if you are considering adding high-value community solar plus DR or storage options, you may find those high-value program models require more than mere collaboration. They may require *silo-busting*.

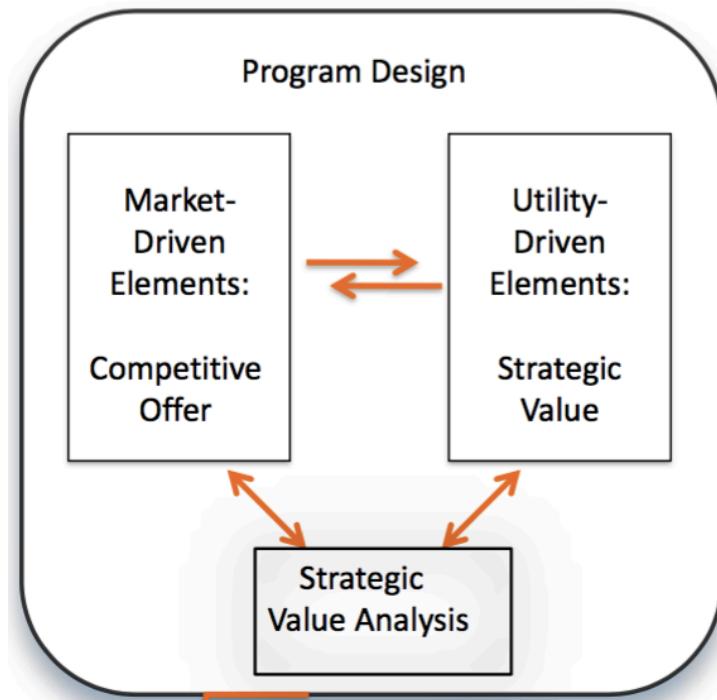


Figure 1. The heart of a best-practice community

solar program plan is collaboration.

You can see the challenge in the diagram above, drawn from CSVP's program-design process. Customer-driven planning steps interact with utility-driven steps, leading to a draft program plan. For example, customer expectations about the best place to site a community solar program have to be considered—but not blindly accepted—by the engineering and procurement folks. The program manager's timeline that puts a ribbon-cutting in mid-winter had better check out with the procurement folks, too. In turn, some customer-friendly system design specs, such as an information portal that shares solar production information with subscribers, might well be considered.

Then a preliminary economic analysis leads back to another cross-departmental go-round. One interesting example is the consideration of design modifications that can increase the net benefit of the solar project. Often, community solar can be designed with an anchor customer in mind. So, for example, if a commercial anchor customer is willing to host a carport system and pay a reasonable premium for first dibs on shade, that could help the project economics. It's a bit messy, but for the most part, it's unavoidable. Sometimes utility top-management may tell one program manager to "just do it," without much involvement from other departments, but we've found that strategy leads to delays, higher program costs, under-performance, and awkward meetings after all, with those cross-departmental work groups that simply need to be at the table.

So, if collaboration is unavoidable, do we have any advice to help? The CSVP team agrees that there are some things you can do to promote effective collaboration from the staff level, but there are also some things that need to change at the top. In this article, we outline six tips for working at the staff level, and then we'll consider calling on the execs.

1) Consider your counterparts in different departments as stakeholders. Just as the solar program manager has a stake in the outcome of a new community solar program, so do the folks in engineering, customer service, and IT. Find out what matters to each of the people you'll have to work with, including what other pressures they're under and how they see ongoing changes within the utility as a whole. Just as there are widely differing stakeholder views in the community, there are widely differing view within any utility. Ask, listen, and expect some compromise.

2) Apply marketing savvy inside the utility, as well as outside it. Once upon a time, Cliburn and Associates taught a unit on program design for the Association of Energy Services Professionals, called Internal Marketing. Why not do a little research to consider not only your colleagues' professional motivations, but also to answer such questions as, Does key collaborators have different decision-making styles? Do they prefer different ways of receiving and presenting information? Are there commonalities that bring people in different departments together? Plan communications accordingly.

3) Make it *about the customer*. Internal stakeholders will have their differences, but a unified focus on the customer can ease a lot of tension. The CSVP process diagram puts utility technical and economic concerns up front, too, but even those concerns, such as resource costs, grid management, billing processes, and so on are ultimately driven by the mission to serve customers better.

4) Reward the broader view. The solar program manager or program designer is often more of a generalist than many of the other internal stakeholders. Sometimes this person has a technical background, or sometimes a background in marketing or finance. But there will always be folks with more degrees and experience in a particular specialty at the table. Accept and share the fact that when it comes to community solar, broader is better. The common playing field should be a place where internal experts come to work together, speaking plainly and striving to make the whole, integrated

program succeed. Readers will find that CSVP's [GAP analytic process](#) echoes this strategy. Decision-makers are interested in the program narrative and bottom-line illustrations, not just the spreadsheets.

5) Come together around an exciting campaign or event. Collaborate to develop a program design and implementation schedule that diverse internal stakeholder can work toward and celebrate together. The program designer and manager should keep everyone—even the folks deep in the trenches of IT or engineering—informed about planning progress (such as a good word from the CEO!) or progress on the roll-out. By planning around an event, such as a ribbon-cutting or reception for community solar subscribers, the planner can invite cross-departmental players and publicly recognize the whole team.

6) Consider working with an outside innovator. Community solar innovators may raise some solutions that disrupt the organizational *status quo*, but sometimes—and in the right measure—that's a good thing. This includes the option to use a facilitator who knows how to make cross-departmental collaborations work, as well as pre-designed solar-development and program solutions, if they actually suit your company's needs. To help, CSVP offers an [Outsourcing Decision Key](#) in its Solutions Toolkit.

Finally, a word about the limits of staff-led collaborations. The fact is, such efforts are no substitute for leadership, which comes from the top. Some utilities don't even have an open network for sustained collaboration; they have silos that often act as closed systems, with their own cultures and success-measures that do not reward shared efforts. In such cases, top-management has to take the lead, or a cross-departmental program success may be even harder to achieve again. On this point, we like to cite one of our industry's program-evaluation pioneers, Jane Peters. She once interviewed numerous utility program evaluators, to see what, if anything, most successful programs had in common. What did she find? The top predictor of program success is *top-management support*.

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For the program designer who has tested the waters, and found customer-interest in community solar, the challenge of rallying the cross-departmental troops can be made a whole lot easier if you also have top-management support.

Our first recommendation is to take this article—or some ideas from it—to the top. Sometimes utility executives do not realize how difficult it can be to design and manage a program like community solar, which requires cross-departmental collaboration. Often, the division head is facing his or her own difficulties with friction between different divisions in the utility—and it is easier to hope that a staffer can just figure things out, without calling for help from another side of the building. Practically speaking, the trick is to assure your boss that community solar is not the only program that will benefit from a strong collaborative effort! It may only be one of the first.

Program integration, especially on the distributed energy resource (DER) front is unavoidable in the changing utility landscape. For example, the 2017 [Utility Dive State of the Electric Utility Survey](#) reported that there is now little doubt about the inevitability of more integrated DER strategies. It's notable (and worth sharing, too) that *Utility Dive* found the #3 obstacle to utility industry transformation, close behind cost and regulatory considerations, is internal resistance to change. You and your division manager—and your CEO—are not alone in facing the need to advance new internal strategies, more collaboration, and even *silo-busting*.

A best-case scenario would be that your top-level management will see how community solar can be a market-based laboratory, drawing on voluntary participation from enthusiastic customers to work with a cross-departmental team and possibly some outside expertise, to demonstrate how a 21st century program strategy can work for the utility, the customer, and the community at large. CSVP offers several resources that help to facilitate this strategy.

If a few staff leaders need to get the ball rolling, they might plan a brown-bag lunch for people from different siloed teams to meet together. The topic could be [process mapping](#). Working with your brown-bag lunch mates, sketch your actual process on a white board or flip chart, or use colorful Post-It notes and move them around to change your current process into a [better one](#). Show when and why community solar includes people from utility resource planning, market research or customer data, procurement, rates, billing and IT, engineering, customer programs, community relations, communications—including, of course, wherever you find yourself.

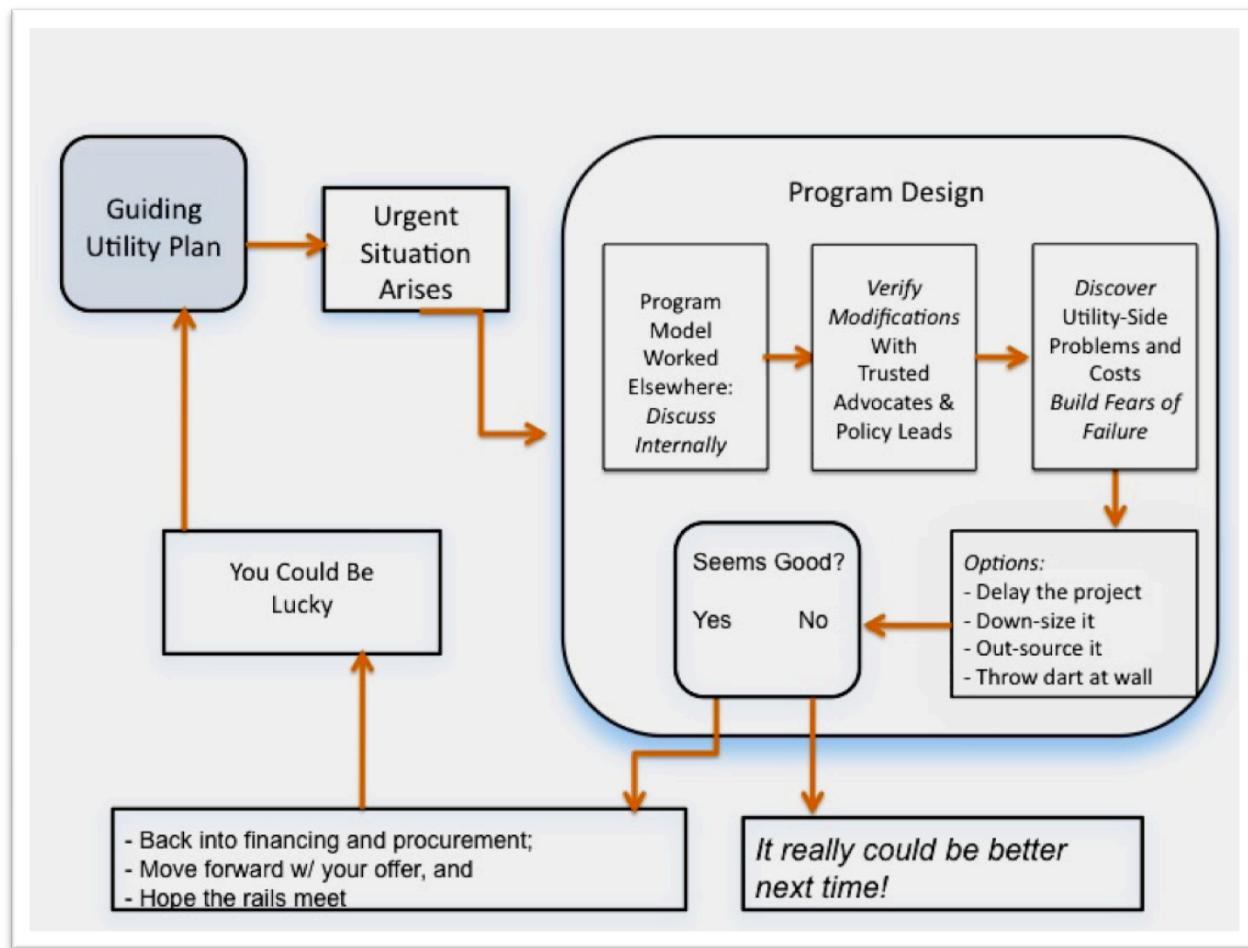


Figure 2. Process Problem: Community Solar Program Design Effort to Avoid!

If your process is a mess, or if your lunch mates from different departments can't agree on what it looks like, you know it's a problem. Ask the boss to come take a look—or snap a photo and send it upstairs along with a brave smiley face and a link to this blog and the following tips.

1) Measure Progress. Working from the senior level, you can take the lead, by adding this sentence to everyone's performance evaluation: "What have you done to improve communications between teams and break down existing silos?" And add this to all group leaders' job descriptions: "Improve communications among work groups and departments, and break down existing silos." Then back it up with rewards, ranging from a positive shout-out at staff meetings and sharing of good silo-busting strategies, to chances for a bonus, promotion, or raise.

2) Check Your Information Infrastructure. Some utilities need to work on [integrating](#) information infrastructure, and your "market-based laboratory" may be a good place to identify needs or test progress. Utilities that have integrated their information technology (IT) and operational technology (OT) and then increased internal access to data find that opportunities for collaboration—and savings—multiply. For example, the CSVp webinar on market research pointed out that often, siloed work groups have valuable information that others could cost-effectively use. Top-level management can establish a process for data-sharing that works, not just one time, but again and again.

3) Take Some Advice Biz School Advice. One of our [sources](#), from the Harvard Business School, argues that, from the company-leader's perspective, silo-busting comes down to these two steps:

- Create a Compelling Case for Innovation
- Create a Fully Aligned Strategic Innovation Agenda

It's the latter point—the call for leadership to create an aligned agenda across departments—that is most striking. According to the author, Vijay Govindarajan, "Most senior managements fear that giving strategic guidance to their organizations will stifle their creativity and their willingness to think outside the box." But nothing could be further from the truth. Leadership opens the box and frees staff creativity.

Goals, such as launching a highly integrated community solar program by "X" date, while moving forward from several concerted departments, along the front lines of utility innovation, sets up a workable challenge. This is not unlike the iconic Moon Shot of the 1960s. It was not a detailed challenge, but it led to many careful and highly integrated plans—and success. That is, by the way, the inspiration for this CSVp project, which is part of today's newly iconic, U.S. DOE SunShot Initiative.

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