

# Phase one: Plan your energy hunt

## Energy waste hunt toolkit

This three-phase PDF series is your practical guide to spotting energy waste and taking action.

- 1 Plan your energy hunt**  
Choose your focus, engage your team and get logistics in place
- 2 Conduct your hunt**  
Get your team ready and lead the walkthrough to spot energy waste
- 3 Debrief and follow up**  
Review findings, decide what to act on and keep the momentum going

Meet Javier and Sophia, two energy managers tackling energy waste in different settings. As you work through this toolkit you will learn what to do, when to do it and how to use the right tools with real-world examples from their journeys.



**Javier** (industrial)



**Sophia** (commercial)

Each PDF is practical and packed with:

- Clear instructions for each step
- Templates and tools you can use right away
- Tips and examples to guide your team to action

Whether it is your first energy hunt or your fifth, this toolkit will help you make it count.

## How to navigate this PDF:

- Use the **bookmarks panel** (on the right side) to jump between sections
- **Click** the download button to access tools and templates
- **Reveal** case examples from Javier and Sophia by clicking their images
- At the end of each PDF, you will find:
  - A quick **recapitulation checklist**
  - A **“what’s next”** section to guide you into the next phase of your energy hunt

This toolkit works best on a desktop or tablet, but you can also print or use the tools digitally. If you are using it for the first time, we recommend reviewing all three PDFs in order. Some actions, such as designing the preparatory session or scheduling the debrief session, are introduced in the first PDF but explained in more detail later. Reading the full toolkit first will give you the complete picture.

# Energy hunt basics

Let's start with the basics, what an energy hunt is, why it works and the steps in the process. Understanding the intent behind this process and how it fits into a broader energy strategy will help you make the most of the toolkit and adapt it to your organization.



## What is an energy hunt?

An energy hunt is a structured, team-based process that helps organizations uncover energy waste and identify improvement opportunities. Led by an energy champion or a member of the energy team, a small staff group conducts a walkthrough or review of day-to-day operations to observe how energy is used where it is often wasted.

Unlike formal audits, energy hunts require the people who know the systems best: your team.

The goal is to spot inefficiencies in real time, document them clearly and turn everyday insights into practical actions that reduce energy use and operating costs.



## Why energy hunts work

Energy hunts are hands-on, collaborative and focused on action. They work because:

- **Staff know your operations best.** A typical half-day energy hunt can uncover 20 to 50 instances of waste that might be missed by outsiders.
- **Involving staff builds ownership.** When people help identify opportunities, they are more likely to support and implement changes.
- **Hunts uncover low-cost and no-cost opportunities.** Many fixes, such as simple operational adjustments, help your organization start saving money right away.
- **Hunts build a culture of efficiency.** The result is ongoing savings that continue month after month, not just a one-time win.

Many people assume you need outside experts to find energy-saving opportunities. In some cases, such as optimizing heating, ventilation and air conditioning (HVAC), compressed air or other technical systems, expert support is valuable. But energy hunts led by staff offer unique advantages.

When the people who run the systems help spot waste, it leads to practical insights, more rapid action and changes that stick. Involving staff is not just helpful, it is essential in ensuring long-term energy performance.

## How the process works



# Phase one overview

## 1 Plan the hunt

## 2 Prepare participants

## 3 Conduct the walkthrough

## 4 Debrief and prioritize

## 5 Follow up and act

This phase covers step one of the energy hunt process



Phase two



Phase three

## Why this phase matters

Without proper planning, an energy hunt can fall short of expectations, or worse, feel like a waste of time. This stage sets the foundation for everything that follows.

A well-planned hunt ensures:

- A clear scope and shared expectations
- Leadership and staff are engaged from the start
- Participants are prepared to contribute
- Findings can be translated into real action

A successful energy hunt does not just happen; it is built on thoughtful preparation.

## What you do in this phase:

- Engage leadership and secure support
- Choose the scope and focus of your hunt
- Select your team
- Sign your energy hunt charter
- Create a walkthrough plan with logistics



Start here

Phase overview

Key planning actions

Finalize your plan

Checklist

# Key planning actions

The planning actions in this section do not need to occur in a fixed order. Some may occur at the same time. For others, it might depend on how your organization is structured, who is available or what information you already have.

Think of this as a checklist of key ingredients, not a recipe with rigid steps. Each action plays an important role in setting up a successful energy hunt. Use what follows to guide your thinking, adapt as needed and return to each element as your plan takes shape.

## a. Engage leadership

Leadership support is one of the most important foundations for a successful energy hunt. When leaders are visibly involved, it sends a strong message that the hunt matters and the findings will be taken seriously. When leaders are on board early, teams are more likely to engage and follow through.

### Leadership can help you:

- Allocate time and resources
- Encourage participation across departments
- Authorize follow-up actions
- Connect the hunt to broader business goals like cost savings or greenhouse gas (GHG) reductions

## How to engage leadership



Share **why energy hunts work** as outlined earlier in this PDF (see *why energy hunts work*)



Explain how the hunt connects to **your organizational goals**, such as cost savings, GHG reductions or employee engagement



Clarify the **type of support** you are asking for, such as time, communications, cross-team participation or follow-through on findings



**Confirm and document support from leadership** for scope, goals, expectations and commitment to act on the findings

## b. Choose the scope and focus of your energy hunt

Choosing the right scope helps you stay on track, use your team time wisely and align with your organizational priorities.

### How to choose the scope and focus:

- **Start with your organizational goals.** Are you aiming to reduce energy costs, cut GHG emissions or improve engagement across teams?
- **Decide on what to focus.** You do not have to hunt everywhere at once; pick a system, utility or area that matters most right now. For example:
  - A utility: electricity, natural gas, steam, water
  - A system: HVAC, compressed air, lighting, pumps, etc.
  - A physical area: a single building, floor or department
- **Choose your timeframe.** Some energy waste is only visible during off-hours. Other waste appears during peak production. Consider planning hunts during both downtimes and normal operations if possible.

A common approach for a first hunt is to keep it general, looking for any kind of energy waste across an area about the size of a small manufacturing facility or four to five floors of an office building during working hours. Be sure to review safety protocols for the selected area and confirm any required personal protective equipment (PPE) or tools in advance.

### Success metrics

When defining the scope and focus of your hunt, it is also helpful to set clear success metrics. These can be simple and measurable targets such as:

- The number of opportunities identified (e.g., 20)
- How many make it into your action plan (e.g., 10)
- Quick wins to implement in the first week (e.g., 2)

Including these measures will make it easier to track progress and demonstrate early results.

## c. Select your team

You do not have to do this alone. A great energy hunt includes people who know the systems, the spaces and the day-to-day work. Aim for between six and 12 participants; if more attend, break up the group into smaller groups. Involving the right mix of voices leads to better insights and more follow-through afterward.



### Energy champion

Coordinates the energy hunt and provides direction



### Executive sponsor

Lends visible support, reviews results and approves next steps



### Participants

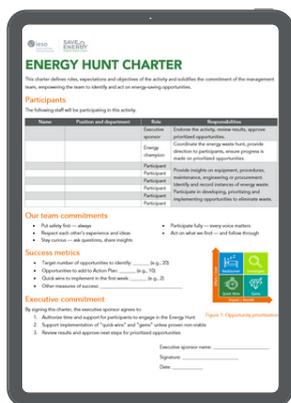
Provide insights, identify waste and implement solutions



### Optional contributors

Bring a fresh perspective from outside the team

## d. Sign your energy hunt charter



After engaging leadership, setting the scope and success metrics and selecting your team, it is time to bring these elements together in an energy hunt charter. The **energy hunt charter** helps you:

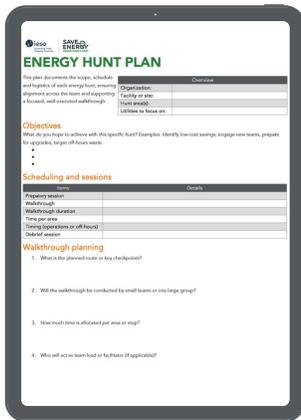
- Confirm leadership commitment
- Record energy hunt participants
- Clarify the hunt's success metrics
- Show visible support that motivates participation



Energy hunt charter template

# Finalize your plan

Now that you have signed your charter and engaged your team, it is time to bring the plan together in one place.



The **energy hunt plan template** help you:

- Document the hunt's objectives, scope and focus areas
- Schedule preparatory, walkthrough and debrief sessions
- List participants and clarify roles
- Plan walkthrough logistics such as route, teams, tools and timing
- Confirm pre-hunt readiness using a built-in checklist

This template does not introduce new steps, it just brings together what you have already decided and adds a few final logistics to ensure everything runs smoothly.



Energy hunt plan template

Signing the charter signals commitment. Filling out the plan helps you stay organized and ready for a smooth execution.

Consider attaching a floor plan, checkpoint list or other documents to help visualize and share the walkthrough plan.

## Curious how others planned their first energy hunt?

Click on the image of Javier or Sophia to see how they approached it and what they learned.



# Phase one checklist

Use this checklist to confirm you have completed the essential planning actions.

- Energy hunt charter signed and saved
- Preparatory session designed and scheduled
- Walkthrough route and key checkpoints confirmed
- Energy hunt walkthrough scheduled
- Debrief session designed and scheduled
- Safety protocols reviewed
- Tools and supplies identified and assigned
- Participants confirmed and invited

This checklist confirms you are ready to launch the hunt, even if the preparatory and debrief sessions have not yet occurred. How to deliver the preparatory and debrief sessions is covered later.

## What's next

With your plan in place, you are ready to move into action. In the next PDF, you will learn how to prepare your participants, conduct the walkthrough and start spotting energy waste. This is where you will also find the preparatory session slide deck and walkthrough tips.



Phase two: Conduct your hunt