

Portfolio Manager Quick Reference Guide

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Follow the steps in this two-page guide to get started using the new Portfolio Manager to benchmark your properties, assess performance, and view results. Download the "Portfolio Manager Quick Start Guide" here. (PDF, 379 KB)

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Use this Quick Reference Guide to identify opportunities for energy efficiency improvements, track your progress over time, and verify results. IDENTIFY ENERGY EFFICIENCY PROJECTS Use Portfolio Manager to identify under-performing buildings to target for energy efficiency improvements and establish baselines for setting and measuring progress for energy efficiency improvement projects over time.

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1. Obtain an outline of the current portfolio in a single place 2. complete a portfolio delivery plan and monitor progress against

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it on a regular basis 3. Start tracking completed project performance compared to forecast 4. PortfolioReview the current portfolio and identify dependencies 5.

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