MISSOURI GREEN BANC

Workforce Education & Training Series

Account Segmentation Worksheet

Building the C-PACE prospect list from the book you already have. Keyed to Segment 7.

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You already know which buildings have aging central plant, deferred envelope, and no controls. That list is a C-PACE prospect list, and it is sitting in your CRM right now at no additional prospecting cost. This worksheet turns it into a working queue.

STEP ONE — PULL THE CANDIDATE SET

- Commercial, industrial, multifamily, and nonprofit-owned property. Owner-occupied and investor-owned both work.
- Accounts with service or repair history on central plant equipment older than fifteen years.
- Accounts where a quote in the last thirty-six months was value-engineered, deferred, or lost to no decision.
- Accounts with no building automation system, or with a system that has been partially abandoned.
- Accounts that have changed ownership in the last eighteen months.
- Buildings in jurisdictions that are Missouri Clean Energy District members. Confirm member status through Missouri Green Banc — do not assume it.

STEP TWO — SCORE EACH ACCOUNT

SIGNAL	WEIGHT	HOW TO READ IT
Equipment age beyond 15 years on central plant	High	The strongest single predictor. Age plus repair frequency is a capital request the owner has been avoiding.
Repeat repair spend on the same asset	High	Annual repair spend is money already leaving the building. It is the comparison the owner will find persuasive.
A recent quote value-engineered or deferred	High	A documented capital constraint on a project you already scoped. Re-open it before the next budget cycle closes.
Multiple eligible measures available	Medium	Bundled scope carries transaction cost better than a single measure and supports a longer weighted-average term.
Recent ownership change	Medium	Capital spent on acquisition, deferred needs documented in diligence, ninety-day window open.

SIGNAL	WEIGHT	HOW TO READ IT
Project value above $200,000	Medium	Smaller projects are eligible but the transaction cost sits heavier on them. Bundle up where you can.
Long-hold owner or owner-occupant	Medium	Removes the split-incentive objection before it is raised.
Publicly known deferred maintenance or a severe-weather event in the area	Low	Opens the resiliency conversation, which is under-marketed and frequently welcome.

STEP THREE — WORK THE QUEUE

ACCOUNT	BUILDING / ADDRESS	ELIGIBLE SCOPE	SCORE	CONTRACTOR	NEXT ACTION & DATE

SEQUENCING NOTE

Work the deferred-and-value-engineered accounts first. Those owners have already told you the constraint is capital — you are not prospecting, you are returning with the missing piece.

Time the outreach to the owner's budget cycle rather than yours. A mechanism that removes the capital budget question lands hardest in the weeks when the capital budget is being argued about.

Markets set in motion. It all starts with collaboration.