TAKE CONTROL OF YOUR FUTURE
SOLUTIONS FOR THE ENERGY INDUSTRY
The pace and impact of change in the energy industry is unrelenting. The following mega-trends are changing the way we produce and use power globally:

- Greater customer choice and demand for more sustainable energy options
- Increasing amount of policies and regulations aimed at reducing carbon emissions
- Shareholders seeking value through new ventures and mergers and acquisitions
- The regionalization of energy, import and export of oil and natural gas, growing regionalization of power markets, and growing interconnection over land and sea
- Mega-industries merging around growth opportunities such as smart cities, transportation, and building and home energy management
- Old infrastructure being replaced and geared toward an increasingly decentralized and smarter power grid architecture known as the Energy Cloud

The energy industry’s transformation includes a range of changes altering traditional strategies and business models. These changes represent the industry’s shift toward the Energy Cloud, an emerging platform of two-way power flows and intelligent grid architecture expected to ultimately deliver higher quality power. While this shift poses significant risks to incumbent power utilities, it also offers major opportunities in a market that is becoming more open, competitive, and innovative. Fueled by steady increases in distributed energy resources, this shift will affect policy and regulation, business models, and the way the grid is operated in every single region of the world.

As the Energy Cloud continues to emerge, the grid of the future—one that is far more dynamic, responsive, and democratized—is coming to life.
AT NAVIGANT, WE COLLABORATE WITH UTILITIES, GOVERNMENT, INVESTORS, MANUFACTURERS, OIL AND GAS COMPANIES, AND MAJOR CORPORATIONS TO HELP THEM THRIVE IN THE RAPIDLY CHANGING ENERGY ENVIRONMENT.

Navigant’s energy industry clients include the world’s 50 largest electric, water, and gas utilities, the 20 largest independent power generators, and the 20 largest gas distribution and pipeline companies. Our seasoned professionals and highly skilled specialists form exceptional teams that formulate the right strategies for each client’s unique challenges and opportunities.

We help clients build, manage, and protect their future by:

- Building capabilities and innovative solutions that advance and transform their businesses
- Managing complexity and removing barriers to accelerate operational performance
- Protecting their business from adversity by meeting compliance requirements, keeping assets secure, and vigilantly managing risks

**Navigant Energy solutions**

We provide solutions to our clients in the following areas:

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**ENERGY SOLUTIONS**

- Business Strategy, Planning & Implementation
- DER Strategy & Implementation
- Innovation and R&D Management
- Technology Advisory
- Due Diligence and M&A Support
- Technology/Appliance Standards, Codes & Testing
- Data Management and Analytics

- Customer Engagement
- Impact Evaluation
- Program Design & Implementation
- Process Evaluation
- Market Adoption & Potential Studies
- End-User Energy Management

- Integrated Resource Management
- Project Development & Transaction Support
- Electric Transmission Planning & Operations
- Grid Modernization
- Performance Excellence
- Resource Procurement

- Regulatory Support
- Risk Management, Compliance & Security
- Litigation Support
STRATEGY AND TECHNOLOGY

With the rules changing and the market in flux, it’s difficult to thrive in the evolving energy industry. Navigant helps clients anticipate opportunities.

Our business and technology strategy team—which includes former utility executives, technologists, and industry regulators—advises electric, water, and gas companies, manufacturers, and energy investors alike. Using considerable knowledge of markets, technologies, and applicable regulations, we craft well-informed and daringly innovative, strategic investment and acquisition plans that can enhance desired return on investment targets at lower risk profiles.

We bring together senior industry professionals with highly skilled specialists to formulate the right strategies as customer requirements, technology, and new business models continue to evolve. Our experts guide clients through the changing energy landscape, providing expertise on the grid’s transformation, renewable energy integration, and approaches to keep costs low.

Navigant helps clients understand the best way to leverage new technologies for competitive advantage. Our team brings targeted insights into innovation and investment opportunities to help clients make informed planning decisions and manage complex technology implementation.

Navigant Strategy and Technology solutions

• Business strategy, planning, and implementation
• DER strategy and implementation
• Innovation and R&D management
• Technology advisory
• Due diligence and M&A support
• Technology and appliance standards, codes and testing
• Data management and analytics

UNPARALLELED EXPERIENCE

Navigant’s seasoned professionals are experienced in strategy, technology, operations, data analytics, and implementation support.

With more than 20 years in the energy sector, Edward Barbour has advised the U.S. Department of Energy, the Energy Information Administration, building product manufacturers, private gas and electric utilities, and energy trade associations. His work is largely in technology management and market assessment, with particular interests in linking business and technology strategies, accelerating the product adoption process, and the effective management and commercial exploitation of research and development.

Rob Wilhite directs business strategy and regulatory advisory services on a global basis for Navigant’s Energy practice. With more than 30 years of experience, he has advised clients on achieving strategic growth imperatives, implementing significant grid modernization and other capital investment programs, and providing strategic visioning and new direction. Rob is co-author of Utility of the Future: Directions for Enhancing Sustainability, Reliability and Profitability and, in 2011, participated in a private energy session as part of President Obama’s Council on Jobs and Competitiveness. Rob has also been recognized as one of the Top 25 U.S. Consultants by Consulting Magazine and identified as one of the Networked Grid 100 Movers and Shakers of the Smart Grid by GreenTech Media.

Todd Williams leads Navigant’s Canadian Energy Practice, advising governments and regulators on policy and program matters. Within industry, he supports generators, retailers, energy service providers, and utilities with rate-making, supply planning, generation contracting, and valuation counsel. His 30-plus years in the industry includes hands-on, international demand-side management experience in both regulated and unregulated energy markets, including program and portfolio design, implementation and evaluation, and regulatory framework development.
POWERFUL RESULTS

ENGIE

Engie is a key leading energy provider in Europe and, with operations in nearly 70 countries on five continents, is a benchmark energy provider in the emerging world. Engie hired Navigant to help explore opportunities to extend its smart cities value propositions. Our team started by exploring the opportunity globally and dug deeper to value the size and growth potential within individual markets by geographies and key segments, including energy, transportation, building, security, lighting, waste, and water.

Armed with those insights, we then worked with local Engie business units to develop granular five-year business plans that considered customer needs, competitive landscape, and compelling market drivers. Finally, we rolled up the geographic business unit plans to help Engie prepare for capital and operational investments.

SOUTHERN CALIFORNIA EDISON COMPANY

Southern California Edison (SCE) is one of the nation’s largest electric public utilities, serving more than 14 million Californians in a service area comprising more than 50,000 square miles. With a major regulatory filing to the California Public Utilities Commission (CPUC) fewer than five months away, the utility hired Navigant to help assess more than 140 distribution technologies.

The project entailed sorting the technologies into key groups and summarizing each by a myriad of factors. We then classified the technologies into profiles; identified enabling, disruptive, and speculative opportunities; quantified expected costs; and described potential impacts and benefits.

Portions of Navigant’s final report—including findings, recommended actions, and an estimated overall timeline for technology and industry changes—were included in SCE’s Distribution Resource Plan filing at the CPUC.
In the quickly evolving energy marketplace, keeping pace with your customers isn’t good enough. Success in building your business hinges on creating the total customer experience.

Our services span all aspects of demand-side resources, including energy efficiency, demand response, renewable energy, distributed generation, and smart-grid-enabled building responses.

We work side-by-side with our clients to dissect market trends, anticipate demand, and assess customer satisfaction levels. We then apply proven methodologies, extensive research, and deep analytical capabilities to pinpoint investment decisions with the strongest potential to move the market and deliver optimum returns for your company.

Navigant’s energy professionals average more than 15 years of direct, hands-on energy industry experience.

Kevin Cooney leads development of Navigant’s Energy Practice internationally. He has served as the leader of the energy efficiency and demand-side consulting team globally for the past six years. The engineers, economists, and social scientists on the team deliver a wide range of customer-focused solutions and analyses for utilities, government entities, investors, and manufacturers. Kevin is the former CEO of Summit Blue Consulting and was vice president of research at ESource. He began his career as a research engineer for Johnson Controls and has analyzed energy efficiency and demand-side technologies, markets, and programs for over 25 years.

Karin Corfee leads the Markets, Customers, Products, and Services team. With more than 30 years of experience, she specializes in strategic planning, energy efficiency, renewable energy, distributed generation, and climate planning initiatives. Recently, she has conducted numerous studies examining the impacts of distributed energy resources on the grid. She helped develop the California Energy Efficiency Strategic Plan and the California Independent System Operator five-year strategic plan. Karin is adept at managing multimillion dollar, multifaceted projects with multiple subcontractors.

Greg Wikler brings 30 years of experience addressing energy efficiency, demand response, distributed generation, and smart grid programs in the demand-side management industry. In addition to extensive work in the United States and Canada, he recently completed a market potential study of combined heat and power for the Government of Saudi Arabia. He is also assisting the Dubai Electricity and Water Authority on demand response market program development and implementation efforts. For the Government of Thailand, he is advising on demand response program potential and demand response market designs suitable for that country.
POWERSFUL RESULTS

HAWAIIAN ELECTRIC COMPANY
A publicly traded electric utility distributing power on five islands to more than 450,000 customers, the Hawaiian Electric Company (HECO) serves 95 percent of the state’s population. Working with state policy makers, HECO is committed to achieving a 100 percent clean energy portfolio by 2045. HECO partnered with Navigant to explore the potential for a fast-responding demand response system to provide operational flexibility to HECO’s five-island grid infrastructure.

Baltimore Gas & Electric
Maryland’s largest electric and natural gas utility delivers power to more than 1.25 million electric customers and more than 650,000 natural gas customers. On behalf of Baltimore Gas & Electric (BGE) and the four additional EmPOWER Maryland utilities, Navigant evaluates about 1,000 GWh of energy savings and 150 MW of peak demand reduction each year. Our analysis supports utility bids of about 75 MW of peak demand reduction into the Pennsylvania-New Jersey-Maryland Interconnection (PJM) capacity market, which can translate into tens of millions of dollars in revenue back to the utilities.
Navigant serves utilities and energy companies with a full range of planning, operations, asset management, and performance excellence solutions.

Our planning expertise includes integrated resource management, project development support, fuel supply and procurement, grid modernization planning, and implementation support, as well as forecasting for a full range of supply-side and demand-side resources. We also provide transmission planning and project development support, including cost benefit analysis and grid modeling capabilities.

We provide operations support for oil and gas production and processing infrastructure, generation, transmission, and distribution systems. Our wide range of performance improvement, change management, and business transformation services helps our clients position for future success, with methodologies tailored to a broad range of energy industry plants and equipment.

We collaborate with our clients to help them improve their asset management approaches. We support capital investment planning, operations and maintenance practices, upgrades, modernization, application of advanced automation and control technologies, smart grid systems, and leveraging big data solutions.

Navigant Operations and Asset Management solutions
- Integrated resource management
- Project development and transaction support
- Electric transmission planning and operations
- Grid modernization
- Performance excellence
- Resource procurement

UNPARALLELED EXPERIENCE
Navigant's extensive industry experience helps clients identify opportunities for growth and select directions with the strongest potential impact and return.

Lee Laviolette leads Navigant’s Global Oil and Gas Practice. He has more than 30 years of strategy, operations, commercial, and technical experience. Lee held various operations management, commercial, and technical roles at ExxonMobil and Total. He also served as resident operations optimization advisor for the Refining Division of a Middle Eastern national oil company. Lee has partnered with client executives across many industries to implement capital projects and transform global operations. All programs have addressed the elements of people, processes, and technology in an integrated way, leading to a step change in operating and financial performance.

David Walls brings more than 30 years of experience leading work in emerging energy technology and business strategy, distributed generation, storage, smart grid, new business model development, commercialization planning, technology and market assessment, project development, and plant operations in the United States and internationally. He works with energy companies, utilities, equipment suppliers, and government institutions in assessing power industry technologies and market opportunities, and developing strategies to pursue those opportunities.

For more than half of Rob Patrylak's 26 years of energy industry experience, he served in senior strategic roles working directly for energy industry companies. He uses this real-world exposure to lead and provide strategic direction for Navigant’s energy markets and strategic resource planning business line, which encompasses such services as integrated resource planning, market assessment, due diligence and transaction support, energy procurement, and analysis of environmental policy, such as the Environmental Protection Agency’s Clean Power Plan.
POWERFUL RESULTS

AUSTIN ENERGY

Austin Energy developed a plan to meet the objectives of the City of Austin’s climate goals with a broad mix of solar, wind storage, and customer-side programs, construction of a new natural gas combined-cycle plant, and the retirement of 1,300 MW of generation.

Navigant conducted an independent economic, financial, and environmental review of the new gas plant to help the city and the utility understand the impact of new local, gas-fired generation to Austin.

NATION OF JORDAN

In 2010 and 2011, Jordan suffered repeated gas supply interruptions to the Arab Gas Pipeline from Egypt, caused by an underlying lack of gas supply in Egypt and several attacks on the pipeline infrastructure in the Sinai Peninsula. Jordan’s Ministry of Energy and Mineral Resources (MEMR) asked Navigant to undertake a study to assess the commercial and technical feasibility of implementing a liquefied natural gas import terminal at the port of Aqaba. With Navigant’s study and detailed construction and startup guidance, Jordan built and launched the project, saving several hundred million dollars in annual fuel costs.
FINANCIAL, RISK, AND REGULATORY

Navigant’s energy professionals assist clients with identifying business strategies to achieve investment diversification and technology adoption ambitions, securing equitable regulatory funding mechanisms, and identifying and mitigating potential risks and threats to critical assets.

Developing a sound strategy is only the first step. Navigant’s financial, risk, and regulatory team can also authenticate the financial support for your strategy through a combination of market power analysis, rate case support, and expert testimony, as well as developing independent cost-of-service and rate design assessments. We combine proprietary models and data with deep, relevant industry experience to provide leading practices for regulatory requirements, helping connect your utility of the future vision to the realities of today’s alternative rate designs.

Finally, as you turn your strategy into reality, our team can further assist to protect your business from adversity by enhancing strategies to keep assets secure and managing risks vigilantly. We help clients strengthen their regulatory compliance as well as their cyber and physical security measures to safeguard business and investment value.

Our regulatory experience can enable greater success for your critical business investment whether it is through mergers and acquisitions or advanced technology deployment. Our expert testimony and analytical assessments can streamline regulatory filings and assist in your compliance with increasingly complex regulations and with industry-leading practices.

Navigant Financial, Risk, and Regulatory solutions

- Regulatory support
- Risk management, compliance, and security
- Litigation support

UNPARALLELED EXPERIENCE

Navigant’s project teams include former North American Electric Reliability Corporation (NERC), Electricity Information Sharing and Analysis Center (E-ISAC), and regional entity executives with experience as operators, engineers, lawyers, law enforcement, military, and security professionals.

Ken Lotterhos provides clients with guidance on both technical and regulatory issues related to power markets, transmission planning, and electric system reliability. Prior to joining Navigant, Ken served as associate general counsel and director of enforcement for the NERC. He also served as director of federal regulatory affairs for the Edison Electric Institute (EEI), where he supported the association and its members on all regulatory matters related to energy delivery, including transmission-related matters, before the Federal Energy Regulatory Commission (FERC).

Julie Solomon brings more than 25 years of consulting experience, specializing in the areas of regulatory and utility economics, financial analysis, and business valuation. She has participated in analyses of proposed regulatory reforms, supply options, and utility industry restructuring in the electric and gas industries. She also advises utility clients on corporate strategy and corporate restructuring and consults with legal counsel on a variety of litigation and regulatory matters, including antitrust litigation and contract disputes. Julie testifies frequently before the FERC on market power issues concerning mergers, other asset transactions, and market rate applications.

Benjamin Grunfeld advises utilities, independent power companies, regulators, and governments. He has considerable experience in the areas of utility strategy and operations, mergers and acquisitions, generation and transmission project development and finance, power procurement, regulatory economics, electricity market, and energy policy design and analysis. Benjamin provides strategic advice and operational expertise to clients in vertically integrated and restructured markets across North America as well as a range of developed and emerging economies around the world.
POWERFUL RESULTS

UK POWER NETWORKS

UK Power Networks (UKPN) is a privately owned electric utility distributing more than 84 million MWh of electricity to more than 8 million customers in London and the southeast of the United Kingdom. Navigant is a strategic advisor supporting UKPN to implement their regulation plan and business strategy. UKPN asked Navigant to review its inspections and maintenance program and help it meet challenging cost reduction targets. Against a goal of finding sustainable savings opportunities of 10 percent over the baseline budget, Navigant’s team has already identified savings of approximately 10 percent annually with more opportunities still in the pipeline.

GRIDEX III SUPPORT

In late 2015, the North American Electric Reliability Corporation (NERC) conducted GridEx III, a rigorous, two-day drill that simulated terrorist attacks on the nation’s power grid.

Our client, a utility with over 1,400 circuit miles of transmission lines throughout the northeast United States and hydro and natural gas generation facilities that provide a quarter of their state’s electricity, engaged Navigant to help them prepare. Our Risk Management, Compliance, and Security team and the client collaborated for months to make improvements in addressing potentially large-scale cyber and physical attacks on their most critical assets.

As a result of planning for and actively participating in GridEx III, our client is better prepared to ensure safety for its personnel and respond more effectively to minimize impacts to reliability.
The world's manufacturing, utility, energy, government, and investment organizations rely on Navigant insights to make educated and informed decisions that help them advance their businesses, accelerate performance, and avoid risk.

Services provided by Navigant Research include syndicated market research across a broad range of energy topics, including Energy Technologies, Utility Transformations, Transportation Efficiencies, and Building Innovations. The team also performs custom research for individual clients and specialized consulting projects, including:

- Applications of research and analysis
- Market sizing and forecasting
- Market segmentation by geography, technology, customer type, end-user market, etc.
- Analyzing the structure of emerging value chains
- Insights on the timing of key market and technology transitions
- Competitive intelligence
- Assessing market demand for new products and assisting with go-to-market strategies
- Providing inputs for business planning, budgeting, and forecasting
- Benchmarking companies within the competitive environment

Navigant's confidential benchmarking services provide generation owners and operators with meaningful insights that empower them to diagnose performance deficiencies and identify areas for operational improvement. All benchmarking data is confidential: access is limited to other subscribers and individual identifying information is never disclosed. Benchmarking services include:

- Generation Knowledge Service - Fossil Units
- Generation Knowledge Service - Hydro Units
- NERC MicroGADS reporting service

MARKET INTELLIGENCE

UNPARALLELED EXPERIENCE

Navigant’s researchers work side-by-side with our clients and Navigant consulting subject matter experts to deliver practical, actionable insights.

Dale Probasco's past experience includes serving as plant construction controls manager for Utah Power & Light Company, nuclear plant construction cost and scheduling manager for Toledo Edison, and plant startup engineer for Bechtel Corporation. He applies his expertise in North America, Asia, and the Middle East to a broad range of assignments including developing corporate and business unit strategy, managing plant construction, developing and implementing generation asset management programs, improving power plant operations, power plant staffing and operational benchmarking, and providing support on nuclear plant construction and operating cost litigation projects.

Peter Asmus brings more than 25 years of experience in energy and environmental markets as an analyst, writer, and consultant. He has written three books on the topic of sustainable energy and has served as the lead author of more than 25 different reports covering topics as diverse as different microgrid global market segments (ranging from off-grid, remote communities to direct current data centers), capacity and revenue forecasts, technology evaluations, and regulatory analyses. During the course of this research, he has also profiled more than 50 market players active in this space.

Mackinnon Lawrence is a senior research director leading Navigant Research's Energy Technologies and Utility Transformations programs. With more than a decade of experience as an analyst and attorney serving the international energy sector, he has played a lead role in guiding the Energy Practice’s research agenda focused on the Energy Cloud and emerging technologies transforming the power grid. He is a frequent speaker at industry events and is often quoted in major media outlets including The New York Times, Forbes, and Scientific American.
POWERFUL RESULTS

U.S. DEPARTMENT OF ENERGY

The U.S. Department of Energy (DOE) hired Navigant to analyze the growth of the fuel cell market globally and in the United States.

The DOE also wanted to understand how the United States is positioned against other countries that are leaders in the fuel cell industry. To meet the DOE’s goals, Navigant developed and delivered a comprehensive dataset identifying fuel cell shipments by all manufacturers worldwide for a 10-year period.

We segmented and charted the data by multiple dimensions including end-use application, underlying technology, and size of the fuel cell. Finally, we identified manufacturers’ market shares, company locations, and manufacturing venues to determine the countries selling and manufacturing the greatest number of systems.

MAJOR MERCHANT POWER GENERATOR

A major international merchant power generator with more than 35,000 MW of capacity in more than a dozen countries faced major internal and external difficulties. The challenges included aging plants, an aging workforce, and unfavorable regulatory and market conditions. They asked Navigant to benchmark their situation against industry standards and help chart a course for the future.

Our team conducted detailed assessments of each coal unit, focusing on major cost elements and using comparable units, to benchmark the client’s past and current performance against industry standards. Based on these comparisons, we were able to identify problems and areas of potential improvement, develop detailed unit-by-unit performance improvement plans, and help management enact and monitor the plan.

As a result, our client has reduced non-fuel operating and maintenance costs by nearly 7 percent while improving availability performance by 10 percent. Given that the generation industry overall is experiencing a decline in availability, these improvements have enabled them to survive in a highly competitive market.
SPECIALIZED SOLUTIONS

With practices focused on managing risk and compliance, supporting legal professionals, and helping with complex real estate transactions, Navigant consultants are prepared to help energy clients with solutions that are beyond the expertise of most advisors. Here are a few samples of our specialized solutions.

INVESTIGATIONS AND COMPLIANCE

Navigant’s investigations and compliance professionals collaborate with clients across a wide span of industries to enhance and streamline compliance, uproot and prevent fraud, manage risk, safeguard reputations, and create competitive advantages.

Our solutions include:

• Regulatory compliance support
• Managing and remediating complex investigations
• Mitigating and managing risk

SOLUTIONS FOR ATTORNEYS, CORPORATE COMPLIANCE, AND INTERNAL AUDIT PROFESSIONALS

Navigant provides solutions for inside counsel, corporate compliance, and internal audit professionals, as well as the outside attorneys and law firms who provide critical support and guidance.

Our economists assist energy clients through every phase of a project from defining issues by identifying key economic factors to gathering facts and data and performing due diligence. We build compelling economic arguments based on hard data to support our clients in negotiations with regulators and disputes.

Our solutions include:

• Disputes and investigations
• Forensic investigations
• Legal technology solutions
• Economics

REAL ESTATE

Navigant’s real estate team helps energy clients manage the financing, planning, design, and construction of production and distribution, and upstream and downstream projects. Our team provides comprehensive development, capital, program/project management, and project advisory services.

Through our unique, integrated, multidisciplinary approach leveraging Navigant’s deep strategy, operations, finance, facility planning, and development expertise, we deliver real estate solutions that help our energy clients quickly and cost-effectively achieve their growth objectives.

VALUATION AND FINANCIAL ADVISORY SERVICES

Navigant’s valuation and financial advisory experts are attuned to strategic, legal, and regulatory issues affecting value in the Energy sector. Our clients rely on us to provide valuation and financial advisory services that address their specific needs and not just a “black box” solution. Clients often leverage our valuation and financial advisory work to support regulatory compliance, transaction planning, strategic planning, tax compliance, financial reporting, and litigation/arbitration.

Our professionals are experts in analyzing and valuing businesses, ownership interests, and intangible assets. In addition, our professionals specialize in real, personal, and intellectual property valuation studies, as well as fixed asset inventory and asset management service offerings. In order to ensure clients receive the highest level of expertise, our professionals draw on the deep industry experience of our Energy consulting practice professionals. This integrated and collaborative approach provides clients with unmatched advice to support their most critical decisions.
STAY INFORMED

Keep up with cutting-edge insights and the latest trends in energy technologies, utilities transformation, transportation efficiencies, and building innovations. Navigant Research offers a variety of free newsletters, research updates, access to webinars, and other analyst content.

Register at navigantresearch.com

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ABOUT NAVIGANT

Navigant, Inc. (NYSE: NCI) is a specialized, global professional services firm that helps clients take control of their future. Navigant’s professionals apply deep industry knowledge, substantive technical expertise, and an enterprising approach to help clients build, manage and/or protect their business interests. With a focus on industries and clients facing transformational change and significant regulatory or legal pressures, the Firm primarily serves clients in the healthcare, energy and financial services sectors. Across our range of advisory, consulting, outsourcing, and technology/analytics services, Navigant’s practitioners bring sharp insight that pinpoints opportunities and delivers powerful results. More information about Navigant can be found at navigant.com.