

POWER-SIDE EXPANSION

Power-side engagement

AI load timing and credibility

Large-Load Reality Check

A fixed-fee pilot for power-side teams that need to know which announced large loads are likely to materialize and on what timeline.

For power providers, microgrid developers, energy sellers, origination teams, and infrastructure teams evaluating named large-load opportunities.

QUICK BRIEF

SCOPE

5 named load opportunities

One market-level reality check around real announced loads.

TIMELINE

4 weeks

Ranked load watchlist, weekly deltas, and final readout.

COMMERCIAL MODEL

\$12,000-\$18,000

Fixed-fee pilot with 50% upfront and 50% on final readout.

WHO THIS IS FOR

Built for power-side teams deciding where demand is real enough to pursue

This engagement is for power providers, microgrid developers, energy sellers, and infrastructure teams selling power-related capacity into the AI supply chain.

DECISION SUPPORT

The decisions this helps with

- Prioritize which customer loads to pursue and when
- Assess whether a named load opportunity is real and on schedule
- Decide where to spend origination, diligence, and commercial effort

OUTSIDE-IN ANALYSIS

What we analyze

We analyze named large-load opportunities in one market, including AI campuses or large data-center projects, expected energization timelines, infrastructure constraints, interconnection and readiness signals, and the evidence that suggests whether the load is likely to materialize.

This is the power-side counterpart to an account readiness snapshot.

DELIVERABLES

What we deliver

Executive readout

Explains the main timing risks and what they mean commercially.

Named-target snapshots

Covers each load opportunity in scope, with readiness or timing confidence.

Decision brief

Translates the analysis into origination and prioritization guidance.

Weekly delta updates

Tracks what changed when the work is run as a multi-target pilot.

BEST STARTING POINT

Start with one named load when you need a fast read, then widen to the market watchlist

Start with a single named-load brief if you need a fast read. Expand to a five-load market watchlist if you need broader prioritization.

1 Start with one named load or campus.

2 Validate whether the analysis changes your commercial or technical prioritization.

3 Expand to the larger market-level reality check.

SCOPE, TIMELINE, AND COMMERCIAL MODEL

One market-level pilot focused on materializing load

SCOPE

5 named large-load opportunities in one market

TIMELINE

4 weeks

FORMAT

Ranked load watchlist, weekly deltas, final readout

COMMERCIAL MODEL

Fixed-fee pilot

WORKING PRICE TARGET

\$12,000-\$18,000

PAYMENT STRUCTURE

50% upfront, 50% on final readout

WHY THIS MATTERS

Optionality looks like demand more often than power-side teams can afford

Power-side teams lose time when optionality looks like demand. A named-load reality check helps you decide which announced loads are credible, which ones are early or delayed, where to commit technical diligence, and where commercial attention is likely to pay off first.

PROOF

How the current snapshots act as proof

The existing AI Power & Site Readiness snapshots are the proof base for this engagement. They show how we frame infrastructure constraints, schedule slippage, confidence, and economic exposure.

They are not, by themselves, the market-level large-load watchlist. That watchlist is assembled with you around one market and a specific commercial objective.

LINKED PROOF



Amazon - PECO TSA / Falls Township, PA - Phase 1

Named-campus proof page showing infrastructure timing, confidence, and delay-risk framing.

LINKED PROOF



Applied Digital - Ellendale, ND - Phase 1

Named-campus proof page showing the gap between headline readiness and deliverable capacity.

LINKED PROOF



Meta - Hyperion / Richland Parish, LA - Phase 1

Proof page showing how readiness, confidence, and delay exposure are translated into a decision view.

LINKED PROOF



Microsoft - Wisconsin (Mount Pleasant / Kenosha axis) - Phase 1

Proof page showing benchmarked position and evidence-backed readiness scoring.

LINKED PROOF



xAI - Colossus / Memphis-Southaven - Phase 1

Proof page showing how the methodology handles a high-visibility campus with material infrastructure questions.

NEXT STEP

Start with one named load or one market.

We will tell you which opportunities are likely to materialize, what the major blockers appear to be, and where you should focus first.

Assess named large loads

Start smaller with one named target