

Sales Training Provider Criteria Form

as of November 20, 2014

TRAINING ORGANIZATION

Organization Name **Building Performance & Comfort, Inc.**
 Physical Street Address **266 Spears Ranch Rd.**
 City, State Zip **Jarrell, TX. 76537-1448**
 Business Structure **S Corporation**
 Main Phone **254-793-0211**
 Website www.bpchomeperformance.com

Primary Contact **Doug Garrett**
 Contact Phone **512-585-2016**
 Contact FAX **512-532-6000**
 Email Address dgarrett@texas.net
 Survey Date **2/2/2015**
 Surveyed By **Daniel Jones**
 Lsat Update Date **2/11/2015**

Instructor Name(s)	Primary Expertise	Years of Training Experience	Email Address
Doug Garrett	HVAC, Manuals J, D,S-Duct Testing-Green Building-Moisture-Spray Foam	25	dgarrett@texas.net

NOTE: The information detailed in the following sections encompasses a general overview of the sales training organization. If information is also provided for specific courses, each course is detailed on separate, subsequent tabs.

ORGANIZATION RESUME CRITERIA		REPORTED INFORMATION
Organization Resume	Number of Participants Trained Per Year	250-1,000
	Years in Sales Training Related to Energy Efficiency, HVAC Equipment, Performance Operations, Market Barriers and Sales Strategies	25
	Client Types: Manufacturer, Distributor, Utility, Contractor, Non-Profit, Building Owners and Operations, Contractor Assn	All
	Number of Staff Members (and/or subconsultants utilized)	2
	Local, Regional, State Territories	Nationwide
	Instructor References	ACCA EPIC J,D,S-BPI HVAC/Heat Pump Pro/NCI Air Balancing
MARKET FOCUS OPTION		COMMENTS
Market Focus (Audience)	Residential	HVAC with House As A System Building Performance
	Light Commercial	HVAC, Energy Codes, IAQ
	Utility Programs	I founded and ran the Austin Energy Utility Programs for a decade.
	Municipal	
COURSE TOPIC OPTION		COMMENTS
Course Topic (This includes specialties for Residential, Light Commercial, Heavy Commercial, Municipal, and Utility within each focus option.)	Technical HVAC Training	Specializing in the building performance approach to HVAC for contractors.
	HVAC Workforce Sales Training with Technical Emphasis	
	with Non-Technical Emphasis	I have been the lead trainer for the TX Low Income Weatherization Program for 20 years.
	Whole House Building Science and/or Energy Efficiency Sales Training	How Your Sales Agents Should Sell the High Performance Homes You Are Building
Energy Efficiency	The House Is A System	
TRAINING COURSE FORMAT CRITERIA		REPORTED INFORMATION
Training Course Format	Class Length	Half or full day
	Student Goals and Objectives	Fully appreciate and understand how HVAC sizing and duct design relate to home retrofit opportunities
	Student Testing & Evaluation Criteria	Testing as required
DELIVERY METHOD OPTION		COMMENTS
Delivery Method	Online Live Web Cast	
	Onsite Classroom Course instruction	We come to you.
	Onsite Hands-on Lab Sessions	

Sales Training Provider Criteria Form

as of November 20, 2014

	Field Site Training Sessions		
	Remote Coaching		
COURSE CONTENT OBJECTIVE OPTION		COMMENTS	
Course Content Objective	SYSTEM PERFORMANCE: Awareness of technical HVAC Baselines (ACCA, ASHRAE 180....State and National Workforce Certification(s))		
	VALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions (Direct Energy Savings, Non-Energy Benefits)		
	REGULATORY COMPLIANCE: Coaching on and material alignment with California Long Term Energy Efficiency Strategic Plan (CLEESP) and Big Bold Initiative Workforce Knowledge, Skills and Ability (KSA's)/Competencies		
	MARKET GROWTH KSA's: Knowledge, Skills and Ability (KSA's)/Competencies to effect market growth and end-user engagement		
	SALES ETHICS: Covers Sales Ethics Issues including Not Over-selling to Senior Citizens and other sensitive populations, plus Sales Force Knowledge, Skills and Ability (KSA's) of Ethical Business Practices and Goodwill Customer Services		
TAKE AWAY/RESOURCE MATERIAL OPTION		IS THE OPTION OFFERED?	COMMENTS
Take Away/Resource Material (tools, equipment, software, etc.)	Copies of Slides Presented	Yes	
	Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.)	yes	
	Certificate of Attendance Provided	yes	
	Delivery formats for materials:	Yes	
	Hard Copy	Yes	
	Electronic via email one-time transactions	Yes	
	Electronic via email online/on-demand availability	Yes	
FOLLOWUP CRITERIA		REPORTED INFORMATION	Comments
Followup Systems Leading to Implementation and Persistence of Message	Coaching (Telephone/Online/Discussion Forums/Group Conferences)	Yes	
	Ongoing Engagements	Yes	