

**Sales Trainer Criteria**

as of October 8, 2014

**TRAINING ORGANIZATION**

<i>Organization Name</i>	<b>Honeywell International</b>	<i>Primary Contact</i>	<b>Katie Leifeld</b>
<i>Physical Street Address</i>	<b>1985 Douglas Drive</b>	<i>Contact Phone</i>	<b>763-954-4192</b>
<i>City, State Zip</i>	<b>Golden Valley, MN 55422</b>	<i>Contact FAX</i>	<b>763-94-4549</b>
<i>Business Structure</i>	<b>C Corporation</b>	<i>Email Address</i>	<a href="mailto:kathryn.leifeld@honeywell.com">kathryn.leifeld@honeywell.com</a>
<i>Main Phone</i>	<b>763-954-4192</b>		
<i>FAX</i>	<b>763-94-4549</b>		
<i>Website</i>	<a href="http://www.forwardthinking.honeywell.com/training">www.forwardthinking.honeywell.com/training</a>		

<i>Instructor Name(s)</i>	<i>Primary Expertise</i>	<i>Years of Training Experience</i>	<i>Contact Information</i>
Joe Cappelletti	Sales Director, past contractor technician and past president of ADI distributorship	36	joe.cappelletti@honeywell.com 401-451-7659
Katie Leifeld	Business Development and Marketing	10	kathryn.leifeld@honeywell.com 763-954-4192

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

<i>ORGANIZATION RESUME CRITERIA</i>		<i>REPORTED INFORMATION</i>	
<i>Organization Resume</i>	Number of Participants Trained Per Year	~800 - 1000/year	
	Years in Sales Training Related to Energy Efficiency, HVAC Equipment, Performance Operations, Market Barriers and Sales Strategies	30	
	Client Types: Manufacturer, Distributor, Utility, Contractor, Non-Profit, Building Owners and Operations, Contractor Assn	Distributor, Contractor	
	Number of Staff Members (and/or subconsultants utilized)	3	
	Local, Regional, State Territories	International (US and Canada)	
<i>MARKET FOCUS OPTION</i>		<i>IS THE OPTION OFFERED?</i>	
<i>Market Focus (Audience)</i>	Residential	Yes	
	Light Commercial	Yes	

<b>Training Course Name</b>	<b>Honeywell S.T.E.P.S to Success</b>	
	<b>COURSE TOPIC OPTION</b>	<b>COMMENTS</b>
<b>Course Topic</b>	HVAC Workforce Sales Training	Fundamental Sales Training focused to the Install/Service Technician
	HVAC Workforce Sales Training with Non-Technical Emphasis	
	Energy Efficiency	
	Marketing and Communication Tools & Training (web, marketing, social media)	
	Lead Generation	
	Business Growth Training	
	<b>TRAINING COURSE FORMAT CRITERIA</b>	<b>REPORTED INFORMATION</b>
<b>Training Course Format</b>	Class Length	1 day (8 hours)
	Pre-requisites	None required
	Student Goals and Objectives	Yes
	Student Testing & Evaluation Criteria	Yes
	<b>DELIVERY METHOD OPTION</b>	<b>COMMENTS</b>
<b>Delivery Method</b>	Online Recorded Web Cast (on Demand) or Online Library	Series of 10 reinforcement modules offered to all attendees
	Onsite Classroom Course instruction	
	Onsite Hands-on Lab Sessions	Role play exercises and implementation planning sessions
	Field Site Training Sessions	
	Remote Coaching	Available virtual or live coaching
	<b>COURSE CONTENT OBJECTIVE OPTION</b>	<b>COMMENTS</b>
<b>Course Content Objective</b>	Key Objectives	<p>This sales-focused course is designed to teach Residential and Light Commercial contractor professionals how to engage their customer base by providing customized product and service offerings that their customers want, need and will pay for. Whether it's through increased accessory sales, higher-end system installations or more service enhancements, contractor professionals that attend S.T.E.P.S. to Success can increase their ability to close more business, increase their average ticket price and secure long-lasting customer relationships.</p> <p>Course Topics Include:</p> <ul style="list-style-type: none"> <li>• Redefining the sales process and what it means for your company and for your customer</li> <li>• Ensuring techs and sales people are properly preparing for customer visits to create opportunities for better, more consistent results while in the home or business</li> <li>• Observing the customer's environment for signs of service and product needs</li> <li>• Taking industry jargon such as SEER, MERV, CFM and GPM and translating it into value that the customer will pay for</li> <li>• Providing the right solution and seeing it through</li> <li>• Increasing customer satisfaction and cultivating long-term profitable relationships</li> </ul> <p>Who Should Attend: Residential and Light Commercial HVAC and Plumbing Contractor Owners, Service and Install Technicians and Sales Professionals</p>
	VALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions (Direct Energy Savings, Non-Energy Benefits)	
	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	
<b>TAKE AWAY/RESOURCE MATERIAL OPTION</b>		<b>COMMENTS</b>
<b>Take Away/Resource Material (tools, equipment, software, etc.)</b>	Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.)	<ul style="list-style-type: none"> <li>• Folder of all in-class materials</li> <li>• In-class Workbook with Additional tools section</li> <li>• Recommended Reading/Podcast list for additional training</li> <li>• Customizable implementation guide to help owners and technicians apply sales skills back on the job</li> <li>• Sales tool kit and quick reference guides to maximize internalization and adoption of skills</li> </ul>
	Sample Sales Transaction Documents	
	Delivery formats for materials:	
	Hard Copy	Professionally printed/bound workbook and supporting materials provided
	Electronic via email one-time transactions	Email forms during and after classes
<b>EVALUATION CRITERIA</b>		<b>REPORTED INFORMATION</b>
<b>Participant Evaluation of Instructor and Training Course</b>	Evaluation Method	Post-class evaluation form
	Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent)	Compiled and sent to class host
	Participant Testimonials	Requested
<b>FOLLOWUP CRITERIA</b>		<b>REPORTED INFORMATION</b>
<b>Follow-up Systems Leading to Implementation and Persistence of Message</b>	Coaching (Telephone/Online/Discussion Forums/Group Conferences)	Live or virtual
	Implementation Evaluation Tools/Systems	Live or virtual
	Training Course and Instructor Data Tracking	Internally tracked
	Ongoing Engagements	Live or virtual