us of October 8, 2014			
TRAINING ORGANIZATION			
Organization Name	National Comfort Institute, Inc.	Primary Contact David Holt	
Physical Street Address	4529 Lake Road	Contact Phone <b>706-332-2212</b>	
City, State Zip	Sheffield Lake, OH 44015	Contact FAX 866-508-7058	
Mailing Address	PO Box 147	Email Address davidh@ncihvac.com	
City, State Zip	Avon Lake, OH 44012		
Business Structure			
Website	www.nationalcomfortinstitute.com		
Instructor Name(s)	Primary Expertise	Years of Training Experience Contact Information	
David Holt	Residential Sales, Business Management	30 david@ncihvac.com 706-332-2212	
John Garofalo	Business Management & Leadership	johng@ncihvac.com 713-857-9701	
NOTE: The information detailed in the fo	ollowing sections encompasses a general overview of the sales training organ	nization. If information was also provided for specific courses, each course	
is detailed on separate, subsequent tabs	S		
	ORGANIZATION RESUME CRITERIA	REPORTED INFORMATION	
	Number of Participants Trained Per Year	3,010 (2013) 1,979 (2014 YTD)	
	Years in Sales Training Related to Energy Efficiency, HVAC Equipment,	20	
	Performance Operations, Market Barriers and Sales Strategies	20	
Organization Resume	Client Types: Manufacturer, Distributor, Utility, Contractor, Non-Profit,	Manufacturer, Distributor, Utility, Contractor	
	Building Owners and Operations, Contractor Assn	30	
	Number of Staff Members (and/or subconsultants utilized)		
	Local, Regional, State Territories	International (US and Canada)	
	MARKET FOCUS OPTION	COMMENTS	
	Residential		
	Light Commercial		
Market Focus (Audience)	Heavy Commercial	Through National Balancing Council sister organization	
	Utility Programs	NCI is an SCE consultant intimately familiar with CQM and CQR.	
	Municipal	COMMATAITC	
	COURSE TOPIC OPTION  Tachnical HIVAC Training	COMMENTS  Source   sources not offered by typical manufactures (distributor	
	Technical HVAC Training HVAC Workforce Sales Training	Several courses not offered by typical manufacturer/distributor	
	with Non Tochnical Emphasis		
	with Non-Technical Emphasis Whole House Building Science and/or Energy Efficiency Sales Training	Including BPI Certification Exams	
Course Topic	Energy Efficiency	mendang of i certification Exams	
	Marketing and Communication Tools & Training (web, marketing, social		
	media)	Through downloads and ContractorsIMAGE division	
	Lead Generation		
	Business Growth Training		
	Dustiness Growth Huming		

## **Sales Trainer Criteria**

as of October 8, 2014

	TRAINING COURSE FORMAT CRITERIA	REPORTED INFORMATION	
	Class Length	2 days	
Training Course Format	Pre-requisites	None	
	Student Goals and Objectives	Yes	
	Student Testing & Evaluation Criteria	Yes	
	DELIVERY METHOD OPTION	COMMENTS	
	Onsite Classroom Course instruction	Yes	
Delivery Method	Onsite Hands-on Lab Sessions	Yes	
	Field Site Training Sessions	Optional	
	COURSE CONTENT OBJECTIVE OPTION	COMMENTS	
	PROGRAMS: Awareness of IOU QI/QM/QR Service Programs		
	SYSTEM PERFORMANCE: Awareness of technical HVAC Baselines (ACCA,		
	ASHRAE 180State and National Workforce Certification(s))		
	VALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions		
	(Direct Energy Savings, Non-Energy Benefits)		
Course Content Objective	MARKET GROWTH KSA's: Knowledge, Skills and Ability (KSA's)/Competencies		
Course content objective	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		
	BENCHMARKING, COMMISSIONING and RECOMMISSIONING		
	TAKE AWAY/RESOURCE MATERIAL OPTION	COMMENTS	
	Client Post Installation Follow-Up Templates		
	Sample Client Post Installation Follow-Up Reports		
	Other Sales Transaction Templates (questions to ask, proposals, cross-selling		
Take Away/Resource Material	checklists, etc.)		
7 7	Sample Sales Transaction Documents		
	·		
	Delivery formats for materials:		
	Delivery formats for materials: Hard Copy	Spiral-bound workbook included	
	Delivery formats for materials: Hard Copy Electronic via email one-time transactions	Email forms during and after classes	
	Delivery formats for materials: Hard Copy Electronic via email one-time transactions  EVALUATION CRITERIA	Email forms during and after classes  REPORTED INFORMATION	
	Delivery formats for materials: Hard Copy Electronic via email one-time transactions  EVALUATION CRITERIA  Evaluation Method	Email forms during and after classes	
Participant Evaluation of Instructor and	Delivery formats for materials: Hard Copy Electronic via email one-time transactions  EVALUATION CRITERIA  Evaluation Method Summary Scores of End Course Evaluations (IOU's Standardized Evaluation	Email forms during and after classes  REPORTED INFORMATION  Post-class evaluation form	
Participant Evaluation of Instructor and Training Course	Delivery formats for materials: Hard Copy Electronic via email one-time transactions  EVALUATION CRITERIA  Evaluation Method Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent)	Email forms during and after classes  REPORTED INFORMATION  Post-class evaluation form  Computed at home office	
	Delivery formats for materials: Hard Copy Electronic via email one-time transactions  EVALUATION CRITERIA  Evaluation Method  Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent)  Participant Testimonials	Email forms during and after classes  REPORTED INFORMATION  Post-class evaluation form  Computed at home office  Requested	
	Delivery formats for materials: Hard Copy Electronic via email one-time transactions  EVALUATION CRITERIA  Evaluation Method Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent) Participant Testimonials  FOLLOWUP CRITERIA	Email forms during and after classes  REPORTED INFORMATION  Post-class evaluation form  Computed at home office	
Training Course	Delivery formats for materials: Hard Copy Electronic via email one-time transactions  EVALUATION CRITERIA  Evaluation Method Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent) Participant Testimonials  FOLLOWUP CRITERIA  Coaching (Telephone/Online/Discussion Forums/Group Conferences)	Email forms during and after classes  REPORTED INFORMATION  Post-class evaluation form  Computed at home office  Requested  Comments	
Training Course  Followup Systems Leading to	Delivery formats for materials: Hard Copy Electronic via email one-time transactions  EVALUATION CRITERIA  Evaluation Method Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent) Participant Testimonials  FOLLOWUP CRITERIA  Coaching (Telephone/Online/Discussion Forums/Group Conferences) Implemenation Evaluation Tools/Systems	Email forms during and after classes  REPORTED INFORMATION  Post-class evaluation form  Computed at home office  Requested  Comments  ComfortMaxx software	
Training Course	Delivery formats for materials: Hard Copy Electronic via email one-time transactions  EVALUATION CRITERIA  Evaluation Method Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent) Participant Testimonials  FOLLOWUP CRITERIA  Coaching (Telephone/Online/Discussion Forums/Group Conferences) Implemenation Evaluation Tools/Systems	Email forms during and after classes  REPORTED INFORMATION  Post-class evaluation form  Computed at home office  Requested  Comments	

Course Topic  ILI B  Training Course Format  S S S D Delivery Method	AVAC Workforce Sales Training with Non-Technical Emphasis Energy Efficiency Marketing and Communication Tools & Training (web, marketing, social media) Ead Generation Business Growth Training FRAINING COURSE FORMAT CRITERIA Class Length Pre-requisites Etudent Goals and Objectives Etudent Testing & Evaluation Criteria DELIVERY METHOD OPTION Onsite Classroom Course instruction Onsite Hands-on Lab Sessions	Several samples and digital files provided Based on system performance testing Encourages teamwork and business growth  REPORTED INFORMATION  2 days None required, but HVAC System Performance training a plus  Yes  Yes  COMMENTS
Course Topic  In the second se	Arketing and Communication Tools & Training (web, marketing, social media)  Lead Generation Business Growth Training  TRAINING COURSE FORMAT CRITERIA  Class Length  Pre-requisites  Student Goals and Objectives Student Testing & Evaluation Criteria  DELIVERY METHOD OPTION  Onsite Classroom Course instruction	Based on system performance testing Encourages teamwork and business growth  REPORTED INFORMATION  2 days  None required, but HVAC System  Performance training a plus  Yes  Yes
Course Topic  Li B  Training Course Format  S S S D Delivery Method	Marketing and Communication Tools & Training (web, marketing, social media) lead Generation Business Growth Training TRAINING COURSE FORMAT CRITERIA Class Length Pre-requisites Student Goals and Objectives Student Testing & Evaluation Criteria DELIVERY METHOD OPTION Onsite Classroom Course instruction	Based on system performance testing Encourages teamwork and business growth  REPORTED INFORMATION  2 days  None required, but HVAC System  Performance training a plus  Yes  Yes
Lu   B	ead Generation Business Growth Training FRAINING COURSE FORMAT CRITERIA Class Length Pre-requisites Student Goals and Objectives Student Testing & Evaluation Criteria DELIVERY METHOD OPTION Onsite Classroom Course instruction	Based on system performance testing Encourages teamwork and business growth  REPORTED INFORMATION  2 days  None required, but HVAC System  Performance training a plus  Yes  Yes
Training Course Format  S S D Delivery Method	Business Growth Training  TRAINING COURSE FORMAT CRITERIA  Class Length  Pre-requisites  Student Goals and Objectives Student Testing & Evaluation Criteria  DELIVERY METHOD OPTION  Onsite Classroom Course instruction	Encourages teamwork and business growth  REPORTED INFORMATION  2 days  None required, but HVAC System  Performance training a plus  Yes  Yes
Training Course Format  S S S D Delivery Method	Class Length Pre-requisites Student Goals and Objectives Student Testing & Evaluation Criteria DELIVERY METHOD OPTION Onsite Classroom Course instruction	REPORTED INFORMATION  2 days  None required, but HVAC System  Performance training a plus  Yes  Yes
Training Course Format  S S S D Delivery Method	Class Length Pre-requisites Student Goals and Objectives Student Testing & Evaluation Criteria DELIVERY METHOD OPTION Onsite Classroom Course instruction	2 days  None required, but HVAC System  Performance training a plus  Yes  Yes
Training Course Format  S S D D Delivery Method	Pre-requisites Student Goals and Objectives Student Testing & Evaluation Criteria DELIVERY METHOD OPTION Onsite Classroom Course instruction	None required, but HVAC System Performance training a plus Yes Yes
Training Course Format  S S  D D Delivery Method	tudent Goals and Objectives tudent Testing & Evaluation Criteria  DELIVERY METHOD OPTION Onsite Classroom Course instruction	Performance training a plus Yes Yes
Delivery Method	tudent Testing & Evaluation Criteria  DELIVERY METHOD OPTION  Onsite Classroom Course instruction	Yes Yes
Delivery Method	tudent Testing & Evaluation Criteria  DELIVERY METHOD OPTION  Onsite Classroom Course instruction	Yes
Delivery Method	DELIVERY METHOD OPTION Onsite Classroom Course instruction	
Delivery Method	Onsite Classroom Course instruction	COMMENTS
Delivery Method		
Delivery Method	Onsite Hands-on Lab Sessions	
		Role play excercises and implementation
[5]		planning sessions
1	ield Site Training Sessions	Optional
R	Remote Coaching	Optional
С	COURSE CONTENT OBJECTIVE OPTION	COMMENTS
V	ALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions	Focuses on Safety, Health, Comfort &
1)	Direct Energy Savings, Non-Energy Benefits)	Efficiency
R	REGULATORY COMPLIANCE: Coaching on and material alignment with California	Focuses on single-family residential
L	ong Term Energy Efficiency Strategic Plan (CLEESP) and Big Bold Initiative	marketplace initiatives
Course Content Objective	Vorkforce Knowledge, Skills and Ability (KSA's)/Competencies	
Course Content Objective	MARKET GROWTH KSA's: Knowledge, Skills and Ability (KSA's)/Competencies to	
e	ffect market growth and end-user engagement	
S	ALES ETHICS: Covers Sales Ethics Issues including Not Over-selling to Senior Citizens	Entire program built on foundation of quality
a	nd other sensitive populations, plus Sales Force Knowledge, Skills and Ability	and integrity
(+	KSA's) of Ethical Business Practices and Goodwill Customer Services	
T.	TAKE AWAY/RESOURCE MATERIAL OPTION	COMMENTS
Jo	ob Pricing Templates	Upfront pricing system examples discussed
S	ample Job Pricing	Included in workbook
O	Other Sales Transaction Templates (questions to ask, proposals, cross-selling	Provided digitally so students can easily
Take Away / Becourse Marterial	hecklists, etc.)	customize to fit their business
Take Away/Resource Material	ample Sales Transaction Documents	Included in workbook
	Delivery formats for materials:	

	Hard Copy	Spiral-bound workbook included
	Electronic via email one-time transactions	Email forms during and after classes
EVALUATION CRITERIA		COMMENTS
	Evaluation Method	Post-class evaluation form
Participant Evaluation of Instructor	Summary Scores of End Course Evaluations (IOU's Standardized Evaluation	Computed at home office
and Training Course	Summary or Equivalent)	
	Participant Testimonials	Requested
	FOLLOWUP CRITERIA	Comments
Follower Systems Londing to	Coaching (Telephone/Online/Discussion Forums/Group Conferences)	
Followup Systems Leading to Implementation and Persistence of Message	Implemenation Evaluation Tools/Systems	ComfortMaxx software
	Training Course and Instructor Data Tracking	Internally tracked
	Ongoing Engagements	

Traning Course Name	Performance-Based System Renovation Sales		
	COURSE TOPIC OPTION	COMMENTS	
	HVAC Workforce Sales Training with Non-Technical Emphasis		
Course Topic	Energy Efficiency		
	Marketing and Communication Tools & Training (web, marketing, social media)	Several samples and digital files provided	
	Lead Generation	Based on system performance testing	
	Business Growth Training	Encourages teamwork and business growth	
	TRAINING COURSE FORMAT CRITERIA	REPORTED INFORMATION	
		15 x 90 minute sessions (online), 3 days a	
	Class Length	week for 5 weeks	
Tuninin a Course Forms at		None required, but HVAC System	
Training Course Format	Pre-requisites	Performance training a plus	
	Student Goals and Objectives		
	Student Testing & Evaluation Criteria		
	DELIVERY METHOD OPTION	COMMENTS	
	Online Live Web Cast	90 minute sessions, 3 days/week, 5 weeks	
	Online Recorded Web Cast (on Demand) or Online Library		
	Onsite Classroom Course instruction	3 continuous days if presented live	
Delivery Method		Role play excercises and implementation	
	Onsite Hands-on Lab Sessions	planning sessions	
	Field Site Training Sessions	Optional	
	Remote Coaching	Optional	
	COURSE CONTENT OBJECTIVE OPTION	COMMENTS	
	VALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions (Direct	Focuses on Safety, Health, Comfort &	
	Energy Savings, Non-Energy Benefits)	Efficiency	
	REGULATORY COMPLIANCE: Coaching on and material alignment with California		
	Long Term Energy Efficiency Strategic Plan (CLEESP) and Big Bold Initiative	Focuses on single-family residential	
Course Content Objective	Workforce Knowledge, Skills and Ability (KSA's)/Competencies	marketplace initiatives	
Course Content Objective	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)	Entire program built on foundation of quality	
	of Ethical Business Practices and Goodwill Customer Services	and integrity	
	TAKE AWAY/RESOURCE MATERIAL OPTION	COMMENTS	
	Job Pricing Templates	Upfront pricing system examples discussed	
	Sample Job Pricing	Included in workbook	

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	Client Post Installation Follow-Up Templates	Included in workbook	
	Sample Client Post Installation Follow-Up Reports	Included in workbook	
	Other Sales Transaction Templates (questions to ask, proposals, cross-selling	Provided digitally so students can easily	
Take Away/Resource Material	checklists, etc.)	customize to fit their business	
	Sample Sales Transaction Documents	Included in workbook	
	Delivery formats for materials:		
	Hard Copy	Spiral-bound workbook included	
	Electronic via email one-time transactions	Email forms during and after classes	
	Electronic via email online/on-demand availability	Available to students only	
	EVALUATION CRITERIA	REPORTED INFORMATION	
	Evaluation Method	Post-class evaluation form	
Participant Evaluation of	Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary	Community of at home office	
Instructor and Training Course	or Equivalent)	Computed at home office	
	Participant Testimonials	Requested	
	FOLLOWUP CRITERIA	Comments	
Followup Systems Loading to	Coaching (Telephone/Online/Discussion Forums/Group Conferences)		
Followup Systems Leading to	Implemenation Evaluation Tools/Systems	ComfortMaxx software	
Implementation and Persistence of Message	Training Course and Instructor Data Tracking	Internally tracked	
reisistence of iviessage	Ongoing Engagements		

Traning Course Name	Residential System Performance	
	COURSE TOPIC OPTION	COMMENTS
	Technical HVAC Training	Advanced understanding of proper HVAC system operation and performance in the
	HVAC Workforce Sales Training	
	with Technical Emphasis	
Course Topic	with Non-Technical Emphasis	
•	Energy Efficiency	
	Marketing and Communication Tools & Training (web, marketing, social media)	Several samples and digital files provided
	Lead Generation	Based on system performance testing
	Business Growth Training	Encourages teamwork and business growth
	TRAINING COURSE FORMAT CRITERIA	REPORTED INFORMATION
	Class Length	2 days
Funining Course Format	Pre-requisites	None
Training Course Format	Student Goals and Objectives	Yes
	Student Testing & Evaluation Criteria	Yes
	DELIVERY METHOD OPTION	COMMENTS
	Onsite Classroom Course instruction	
	Onsite Hands-on Lab Sessions	Static pressure and temperature
Delivery Method		measurement labs
	Field Site Training Sessions	Optional
	Remote Coaching	Optional
	COURSE CONTENT OBJECTIVE OPTION	COMMENTS
	PROGRAMS: Awareness of IOU QI/QM/QR Service Programs	
	SYSTEM PERFORMANCE: Awareness of technical HVAC Baselines (ACCA, ASHRAE	
	180State and National Workforce Certification(s))	
	VALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions (Direct	Focuses on Safety, Health, Comfort &
	Energy Savings, Non-Energy Benefits)	Efficiency
	REGULATORY COMPLIANCE: Coaching on and material alignment with California	Focuses on single-family residential
	Long Term Energy Efficiency Strategic Plan (CLEESP) and Big Bold Initiative	marketplace initiatives
Course Content Objective	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	Entire program built on foundation of quality
	and other sensitive populations, plus Sales Force Knowledge, Skills and Ability	and integrity
		1
	(KSA's) of Ethical Business Practices and Goodwill Customer Services	

Talla Assaul (Danassa Adatasia) (talla	Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.)	Delivered via CD to each student
Take Away/Resource Material (tools,	Delivery formats for materials:	
equipment, software, etc.)	Hard Copy	Spiral-bound workbook included
	Electronic via email one-time transactions	Delivered via CD to each student
	EVALUATION CRITERIA	REPORTED INFORMATION
	Evaluation Method	Post-class evaluation form
Participant Evaluation of Instructor and	Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary	Computed at home office
Training Course	or Equivalent)	
	Participant Testimonials	Requested
	FOLLOWUP CRITERIA	Comments
	Coaching (Telephone/Online/Discussion Forums/Group Conferences)	
Followup Systems Leading to Implementation	Implemenation Evaluation Tools/Systems	ComfortMaxx software
and Persistence of Message	Training Course and Instructor Data Tracking	Internally tracked
	Ongoing Engagements	