

Sales Trainer Criteria

as of October 8, 2014

TRAINING ORGANIZATION

<i>Organization Name</i>	SellingEnergy.com	<i>Primary Contact</i>	Rachel Christenson
<i>Physical Street Address</i>	657 Mission Street, Suite 200	<i>Contact Phone</i>	415-814-3744
<i>City, State Zip</i>	San Francisco, CA 94105	<i>Email Address</i>	info@eefg.com
<i>Business Structure</i>	S Corporation		
<i>Website</i>	SellingEnergy.com		

<i>Instructor Name(s)</i>	<i>Primary Expertise</i>	<i>Years of Training Experience</i>	<i>Contact Information</i>
Mark Jewell	Energy Efficiency Sales Training	20 years	mjewell@eefg.com 415-810-3711

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>
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Organization Resume	Number of Participants Trained Per Year	6400
	Years in Sales Training Related to Energy Efficiency, HVAC Equipment, Performance Operations, Market Barriers and Sales Strategies	20 years
	Client Types: Manufacturer, Distributor, Utility, Contractor, Non-Profit, Building Owners and Operations, Contractor Assn	All
	Number of Staff Members (and/or subconsultants utilized)	12
	Local, Regional, State Territories	National and international
	Instructor References	Charles Holcomb, Duke Energy

<i>MARKET FOCUS OPTION</i>	<i>COMMENTS</i>
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Market Focus (Audience)	Residential	Including both single family and multi-family.
	Light Commercial	We teach sement specific selling to targeted end-users such as hospitals, hotels, small retail, grocery, etc.
	Heavy Commercial	Mark Jewell is a known expert in energy efficiency for commercial realestate including overcoming the landlord/tenant barrier and green leasing.
	Utility Programs	This is a strong area of focus for us, including how to build and leverage an effective
	Municipal	

<i>COURSE TOPIC OPTION</i>	<i>COMMENTS</i>
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Course Topic	HVAC Workforce Sales Training with Non-Technical Emphasis	We focus on the sales conversation from the clients perspective and how to translate
	Whole House Building Science and/or Energy Efficiency Sales Training	
	Energy Efficiency	
	Marketing and Communication Tools & Training (web, marketing, social media)	
	Lead Generation	
	Business Growth Training	

<i>TRAINING COURSE FORMAT CRITERIA</i>	<i>REPORTED INFORMATION</i>
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Training Course Format	Class Length	1 hr, 1-day, 2-day, and week-long formats
	Pre-requisites	None
	Student Goals and Objectives	Adopt efficiency-focused professional selling skills as a way to get customers to say "Yes!" to energy efficiency products and services, leading to increased program awareness, income, shareholder value, energy savings, customer satisfaction, and personal satisfaction.
	Student Testing & Evaluation Criteria	Based on standards set by GBCE and AIA.

<i>DELIVERY METHOD OPTION</i>	<i>COMMENTS</i>
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Delivery Method	Online Live Web Cast	Not the preferred method due to attention and retention limitations. Can be used as needed to inform a broad group, but not as effective when trying to change behavior.
	Online Recorded Web Cast (on Demand) or Online Library	Allows for attendees to view content at their own pace and on their own schedule and allows for reviewing the content.
	Onsite Classroom Course instruction	

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	Remote Coaching	As part of the Ninja Network Workshop monthly coaching calls or private as part of a larger training initiative.
COURSE CONTENT OBJECTIVE OPTION		COMMENTS
Course Content Objective	PROGRAMS: Awareness of IOU QI/QM/QR Service Programs	
	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	
	BENCHMARKING, COMMISSIONING and RECOMMISSIONING	
TAKE AWAY/RESOURCE MATERIAL OPTION		COMMENTS
Take Away/Resource Material (tools, equipment)	Copies of Slides Presented	Workbooks are provided
	Financial Analysis Templates	
	Sample Financial Analyses	
	Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.)	
	Sample Sales Transaction Documents	
	Delivery formats for materials:	
	Hard Copy	
Electronic via email online/on-demand availability		
EVALUATION CRITERIA		COMMENTS
Participant Evaluation of Instructor and Training Course	Evaluation Method	Participation and testing in line with AIA and GBCI requirements
	Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent)	We can also provide a Success Report at the end of the training for sharing with all stakeholders.
	Participant Testimonials	A professional photographer is provided for courses of 2 days or longer to provide professional headshots for attendees and to provide images for testimonials. Samples can be seen here: http://sellingenergy.com/pages/testimonials
FOLLOWUP CRITERIA		Comments
Followup Systems Leading to Implementation and Persistence of Message	Coaching (Telephone/Online/Discussion Forums/Group Conferences)	Attendees from trainings two days or longer receive year-long access to the monthly Ninja Network Workshops, online coaching conference calls with Mark Jewell.
	Implementation Evaluation Tools/Systems	
	Training Course and Instructor Data Tracking	
	Ongoing Engagements	

Training Course Name	Learning to S.E.E. (Sell Efficiency Effectively)	
	COURSE TOPIC OPTION	COMMENTS
Course Topic	HVAC Workforce Sales Training with Non-Technical Emphasis	We focus on the sales conversation from the clients perspective and how to translate technical topics into metrics that the decision makers can understand.
	Whole House Building Science and/or Energy Efficiency Sales Training	
	Energy Efficiency	
	Marketing and Communication Tools & Training (web, marketing, social media)	
	Lead Generation	
	Business Growth Training	
	TRAINING COURSE FORMAT CRITERIA	REPORTED INFORMATION
Training Course Format	Class Length	Varies from Keynote to a 2 day program
	Pre-requisites	None
	Student Goals and Objectives	Adopt efficiency-focused professional selling skills as a way to get customers to say "Yes!" to energy efficiency products and services, leading to increased program awareness, income, shareholder value, energy savings, customer satisfaction, and personal satisfaction.
	Student Testing & Evaluation Criteria	Attendance and survey
	DELIVERY METHOD OPTION	COMMENTS
Delivery Method		
	Online Recorded Web Cast (on Demand) or Online Library	http://sellingenergy.com/collections/online-courses/products/learning-to-see-c-i
	Onsite Classroom Course instruction	This is a very effective format for this kind of course. The 2-day program also includes highlights of financial analysis training plus 1-year access to the online Financial Analysis training suite of courses and the Ninja Network Workshops coaching calls.
	Remote Coaching	As part of the Ninja Network Workshop monthly coaching calls or private as part of a larger training initiative.
	COURSE CONTENT OBJECTIVE OPTION	COMMENTS
Course Content Objective	PROGRAMS: Awareness of IOU QI/QM/QR Service Programs	
	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	
	COMMENTS	
	Copies of Slides Presented	Workbooks are provided
	Financial Analysis Templates	
	Sample Financial Analyses	

Take Away/Resource Material (tools, equipment, software, etc.)	Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.)	
	Sample Sales Transaction Documents	
	Delivery formats for materials:	
	Hard Copy	
	Electronic via email online/on-demand availability	
EVALUATION CRITERIA		COMMENTS
Participant Evaluation of Instructor and Training Course	Evaluation Method	Participation and testing in line with AIA and GBCI requirements
	Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent)	We can also provide a Success Report at the end of the training for sharing with all stakeholders.
	Participant Testimonials	A professional photographer is provided for courses of 2 days or longer to take professional headshots for attendees and to provide images for testimonials. Samples can be seen here: http://sellingenergy.com/pages/testimonials
FOLLOWUP CRITERIA		Comments
Followup Systems Leading to Implementation and Persistence of Message	Coaching (Telephone/Online/Discussion Forums/Group Conferences)	Attendees from trainings two days or longer receive year-long access to the monthly Ninja Network Workshops, online coaching conference calls with Mark Jewell.
	Implementation Evaluation Tools/Systems	
	Training Course and Instructor Data Tracking	
	Ongoing Engagements	

Training Course Name	Financial Analysis of Energy Efficiency Projects	
	COURSE TOPIC OPTION	COMMENTS
Course Topic	HVAC Workforce Sales Training with Non-Technical Emphasis	We focus on the sales conversation from the clients perspective and how to translate technical topics into metrics that the decision makers can understand.
	Whole House Building Science and/or Energy Efficiency Sales Training	
	Energy Efficiency	
	TRAINING COURSE FORMAT CRITERIA	REPORTED INFORMATION
Training Course Format	Class Length	Varies from Keynote to a 2 day program
	Pre-requisites	None
	Student Goals and Objectives	Adopt efficiency-focused professional selling skills as a way to get customers to say "Yes!" to energy efficiency products and services, leading to increased program awareness, income, shareholder value, energy savings, customer satisfaction, and personal satisfaction.
	Student Testing & Evaluation Criteria	Attendance and survey
	DELIVERY METHOD OPTION	COMMENTS
Delivery Method	Online Recorded Web Cast (on Demand) or Online Library	We found that online on-demand is the ideal format for this course. http://sellingenergy.com/collections/financial-analysis
	Onsite Classroom Course instruction	In-person classes are paired with the online offering for attendees to watch at a later date or review concepts not grasped in-person.
	Remote Coaching	As part of the Ninja Network Workshop monthly coaching calls or private as part of a larger training initiative.
	COURSE CONTENT OBJECTIVE OPTION	COMMENTS
Course Content Objective	VALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions (Direct Energy Savings, Non-Energy Benefits)	
	TAKE AWAY/RESOURCE MATERIAL OPTION	COMMENTS
Take Away/Resource Material (tools, equipment, software, etc.)	Copies of Slides Presented	Workbooks are provided
	Financial Analysis Templates	
	Sample Financial Analyses	
	Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.)	
	Sample Sales Transaction Documents	
	Delivery formats for materials:	
	Hard Copy	
Electronic via email online/on-demand availability		
	EVALUATION CRITERIA	COMMENTS
Participant Evaluation of Instructor and Training	Evaluation Method	Participation and testing in line with AIA and GBCI requirements
	Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent)	We can also provide a Success Report at the end of the training for sharing with all stakeholders.

Instructor and Training Course	Participant Testimonials	A professional photographer is provided for courses of 2 days or longer to provide professional headshots for attendees and to provide images for testimonials. Samples can be seen here: http://sellingenergy.com/pages/testimonials
FOLLOWUP CRITERIA		Comments
Followup Systems Leading to Implementation and Persistence of Message	Coaching (Telephone/Online/Discussion Forums/Group Conferences)	Attendees from trainings two days or longer receive year-long access to the monthly Ninja Network Workshops, online coaching conference calls with Mark Jewell.
	Implementation Evaluation Tools/Systems	
	Training Course and Instructor Data Tracking	
	Ongoing Engagements	

Training Course Name		Efficiency Sales Professional Certificate Program	
		COURSE TOPIC OPTION	IS THE OPTION OFFERED?
Course Topic		HVAC Workforce Sales Training with Non-Technical Emphasis	We focus on the sales conversation from the clients perspective and how to translate technical topics into metrics that the decision makers can understand.
		Whole House Building Science and/or Energy Efficiency Sales Training	
		Energy Efficiency	
		Marketing and Communication Tools & Training (web, marketing, social media)	
		Lead Generation	
		Business Growth Training	
		TRAINING COURSE FORMAT CRITERIA	REPORTED INFORMATION
Training Course Format		Class Length	5-day program
		Pre-requisites	None
		Student Goals and Objectives	Adopt efficiency-focused professional selling skills as a way to get customers to say "Yes!" to energy efficiency products and services, leading to increased program awareness, income, shareholder value, energy savings, customer satisfaction, and personal satisfaction.
		Student Testing & Evaluation Criteria	Attendance and survey, test for certificate.
		DELIVERY METHOD OPTION	COMMENTS
Delivery Method		Onsite Classroom Course instruction	This is a very effective format for this kind of course. Also includes 1-year access to the online Financial Analysis training suite of courses and the Ninja Network Workshops coaching calls.
		Remote Coaching	As part of the Ninja Network Workshop monthly coaching calls or private as part of a larger training initiative.
		COURSE CONTENT OBJECTIVE OPTION	COMMENTS
Course Content Objective		PROGRAMS: Awareness of IOU QI/QM/QR Service Programs	
		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	
		TAKE AWAY/RESOURCE MATERIAL OPTION	COMMENTS
		Copies of Slides Presented	Workbooks are provided

Take Away/Resource Material (tools, equipment, software, etc.)	Financial Analysis Templates	
	Sample Financial Analyses	
	Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.)	
	Sample Sales Transaction Documents	
	Delivery formats for materials:	
	Hard Copy	
	Electronic via email online/on-demand availability	
EVALUATION CRITERIA		COMMENTS
Participant Evaluation of Instructor and Training Course	Evaluation Method	Participation and testing in line with AIA and GBCI requirements
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FOLLOWUP CRITERIA		Comments
Followup Systems Leading to Implementation and Persistence of Message	Coaching (Telephone/Online/Discussion Forums/Group Conferences)	Attendees receive year-long access to the monthly Ninja Network Workshops, online coaching conference calls with Mark Jewell.
	Implementation Evaluation Tools/Systems	
	Training Course and Instructor Data Tracking	
	Ongoing Engagements	