

Sales Training Provider Criteria Form

as of November 20, 2014

TRAINING ORGANIZATION

Organization Name **TechKnowledge Systems**
 Physical Street Address **8345 NW 66th St., suite 8371**
 City, State Zip **Miami, FL 33166**
 Business Structure **Limited Liability Company**
 Main Phone 786-206-1420
 FAX 413-845-2069
 Website www.techknowledgeonline.net

Primary Contact **Mike Gorman**
 Contact Phone 786-206-1420
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 Survey Date **2/10/2015**
 Surveyed By **Daniel Jones**
 Lsat Update Date **2/11/2015**

Instructor Name(s)	Primary Expertise	Years of Training Experience	Email Address
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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	500	
	Years in Sales Training Related to Energy Efficiency, HVAC Equipment, Performance Operations, Market Barriers and Sales Strategies	15	
	Client Types: Manufacturer, Distributor, Utility, Contractor, Non-Profit, Building Owners and Operations, Contractor Assn	all of these types shown, plus insurance companies, Architects, Realtors	
	Number of Staff Members (and/or subconsultants utilized)	2	
	Local, Regional, State Territories	US, Canada	
	Instructor References	See website	
MARKET FOCUS OPTION		COMMENTS	
Market Focus (Audience)	Residential		
	Utility Programs		
COURSE TOPIC OPTION		COMMENTS	
Course Topic	with Non-Technical Emphasis		
	Whole House Building Science and/or Energy Efficiency Sales Training		
	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	Various programs as needed to suit clients needs	
	Pre-requisites	None	
	Student Goals and Objectives	Various	
	Student Testing & Evaluation Criteria	Course participation, optional written test,	
DELIVERY METHOD OPTION		COMMENTS	
Delivery Method	Online Live Web Cast		
	Online Recorded Web Cast (on Demand) or Online Library		
	Onsite Classroom Course instruction		
	Field Site Training Sessions		
	Remote Coaching		
COURSE CONTENT OBJECTIVE OPTION		COMMENTS	

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Course Content Objective	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		COMMENTS	
Take Away/Resource Material (tools, equipment, software, etc.)	Copies of Slides Presented		
	Financial Analysis Templates		
	Sample Financial Analyses		
	Job Pricing Templates		
	Sample Job Pricing		
	Client Post Installation Follow-Up Templates		
	Sample Client Post Installation Follow-Up Reports		
	Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.)		
	Sample Sales Transaction Documents		
	Certificate of Attendance Provided		
	Delivery formats for materials:		
	Hard Copy		
	Electronic via email one-time transactions		
Electronic via email online/on-demand availability			
EVALUATION CRITERIA		COMMENTS	
Participant Evaluation of Instructor and Training Course	Evaluation Method	written questionnaire	
	Participant Testimonials		
FOLLOWUP CRITERIA		Comments	
Followup Systems Leading to Implementation and Persistence of Message	Coaching (Telephone/Online/Discussion Forums/Group Conferences)		
	Implementation Evaluation Tools/Systems		
	Training Course and Instructor Data Tracking		
	Ongoing Engagements		

Training Course Name	The P Process; Position>Price>Propose>Profit
COURSE TOPIC OPTION	
Course Topic	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
DELIVERY METHOD OPTION	
Delivery Method	Online Live Web Cast
	Online Recorded Web Cast (on Demand) or Online Library
	Onsite Classroom Course instruction
	Field Site Training Sessions
	Remote Coaching
COURSE CONTENT OBJECTIVE OPTION	
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TAKE AWAY/RESOURCE MATERIAL OPTION	
Take Away/Resource Material (tools, equipment, software, etc.)	Copies of Slides Presented
	Financial Analysis Templates
	Sample Financial Analyses
	Job Pricing Templates
	Sample Job Pricing
	Client Post Installation Follow-Up Templates
	Sample Client Post Installation Follow-Up Reports
	Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.)

	Sample Sales Transaction Documents
	Certificate of Attendance Provided
	Delivery formats for materials:
	Hard Copy
	Electronic via email one-time transactions
	Electronic via email online/on-demand availability
EVALUATION CRITERIA	
<i>Participant Evaluation of Instructor and Training Course</i>	Evaluation Method
	Participant Testimonials
FOLLOWUP CRITERIA	
<i>Followup Systems Leading to Implementation and Persistence of Message</i>	Coaching (Telephone/Online/Discussion Forums/Group Conferences)
	Implementation Evaluation Tools/Systems
	Training Course and Instructor Data Tracking
	Ongoing Engagements