

Sales Trainer Criteria

as of October 8, 2014

TRAINING ORGANIZATION

<i>Organization Name</i>	DAGustavson Consulting	<i>Primary Contact</i>	Dale Gustavson
<i>Physical Street Address</i>	23798 Los Pinos Court	<i>Contact Phone</i>	951-277-2180
<i>City, State Zip</i>	Corona, CA 92883	<i>Contact FAX</i>	951-277-2972
<i>Main Phone</i>	951-277-7401	<i>Email Address</i>	dale@gustavson.us

<i>Instructor Name(s)</i>	<i>Primary Expertise</i>	<i>Years of Training Experience</i>	<i>Contact Information</i>
Dale Gustavson	HVAC Energy Efficiency / Energy Efficiency Policy	28 Years	dale@gustavson.us 951-277-2180

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 pages.

	ORGANIZATION RESUME CRITERIA	REPORTED INFORMATION
Organization Resume	Number of Participants Trained Per Year	600
	Years in Sales Training Related to Energy Efficiency, HVAC Equipment, Performance Operations, Market Barriers and Sales Strategies	28
	Client Types: Manufacturer, Distributor, Utility, Contractor, Non-Profit, Building Owners and Operations, Contractor Assn	Manufacturer, Distributor, Utility, Contractor Assn, Non-Profit
	Number of Staff Members (and/or subconsultants utilized)	1
	Local, Regional, State Territories	National
	Instructor References	See Testimonials in Resume

	MARKET FOCUS OPTIONS	COMMENTS
Market Focus (Audience)	Light Commercial	Created primarily for HVAC and controls contractors.
	Utility Programs	Useful to utilities for outreach to HVAC and controls contractors

	COURSE TOPIC OPTIONS	COMMENTS
Course Topic	HVAC Workforce Sales Training with Non-Technical Emphasis	Unique, atypical training on sales cycles, proposals philosophy, market differentiation
	Energy Efficiency	Geared for HVAC and controls contractors focused on the energy efficiency value proposition.
	Business Growth Training	Geared for HVAC and controls contractors focused on the energy efficiency value proposition.

	TRAINING COURSE FORMAT CRITERIA	REPORTED INFORMATION
Training Course Format	Class Length	Varies from 2 hours to 1.5 days
	Pre-requisites	
	Student Goals and Objectives	Become uniquely positioned to compete with other market actors
	Student Testing & Evaluation Criteria	None. Up to students to succeed in the marketplace.

	DELIVERY METHODS	COMMENTS
Delivery Method	Online Live Web Cast	
	Online Recorded Web Cast (on Demand) or Online Library	
	Onsite Classroom Course instruction	Host/client provides location.
	Remote Coaching	By telephone at an hourly rate.

	COURSE CONTENT OBJECTIVE OPTIONS	COMMENTS
Course Content Objective	PROGRAMS: Awareness of IOU QI/QM/QR Service Programs	Complete grasp of this subject matter and the policies that led to them.
	SYSTEM PERFORMANCE: Awareness of technical HVAC Baselines (ACCA, ASHRAE 180....State and National Workforce Certification(s))	Complete grasp of the non-technical aspects of the ANSI standards.
	VALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions (Direct Energy Savings, Non-Energy Benefits)	Expert in market barriers to EE-projects and proposals to overcome.
	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	Was "in the room" when these policies were adopted.

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	MARKET GROWTH KSA's: Knowledge, Skills and Ability (KSA's)/Competencies to effect market growth and end-user engagement	Lean toward 50,000 foot level "positioning strategies."
TAKE AWAY/RESOURCE MATERIAL OPTIONS		COMMENTS
Take Away/Resource Material (tools, equipment, software, etc.)	Copies of Slides Presented	Slides are content heavy to reduce the need for notetaking.
	Sample Financial Analyses	
	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.)	Prospect questions and facility audit hints from real sales used as examples.
	Sample Sales Transaction Documents	
	Hard Copy	"Business of Energy Management - Doing It Right & Making Money At It"
	Electronic via email one-time transactions	
EVALUATION CRITERIA		COMMENTS
Participant Evaluation of Instructor and Training Course	Participant Testimonials	Hundreds on file.
FOLLOWUP CRITERIA		Comments
Followup Systems Leading to Implementation and Persistence of Message	Coaching (Telephone/Online/Discussion Forums/Group Conferences)	One-on-one Q&A/discussion/coaching on real world challenges by phone.

Training Course Name	You'll Only Hear This Once
<i>COURSE TOPIC OPTION</i>	
Course Topic	Energy Efficiency
	Business Growth Training
<i>DELIVERY METHOD OPTION</i>	
Delivery Method	Online Live Web Cast
	Online Recorded Web Cast (on Demand) or Online Library
	Onsite Classroom Course instruction
<i>COURSE CONTENT OBJECTIVE OPTION</i>	
Course Content Objective	VALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions (Direct Energy Savings, Non-Energy Benefits)
	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
<i>TAKE AWAY/RESOURCE MATERIAL OPTION</i>	
Take Away/Resource Material (tools, equipment, software, etc.)	Prepared Scripts
	Sales Tool Kit
	Delivery formats for materials:
	Hard Copy
<i>EVALUATION CRITERIA</i>	
Participant Evaluation of Instructor and Training Course	Paper Survey
	Participant Testimonials
<i>FOLLOWUP CRITERIA</i>	
Followup Systems Leading to Implementation and Persistence of Message	Telephone Support