

Sales Training Provider Criteria Form

as of November 20, 2014

TRAINING ORGANIZATION

 Organization Name **Building Performance Workshop**

 Primary Contact **Corbett Lunsford**

 Physical Street Address **5928 N. Paulina St.**

 Contact Phone **773-271-5310**

 City, State Zip **Chicago, IL 60660**

 Email Address corbett@buildingperformanceworkshop.com

 Business Structure **Limited Liability Company**

 Survey Date **2/1/2015**

 Main Phone **773-271-5310**

 Surveyed By **Daniel Jones**

 Website <http://BuildingPerformanceWorkshop.com>

 Lsat Update Date **2/11/2015**

Instructor Name(s)	Primary Expertise	Years of Training Experience	Email Address
Corbett Lunsford	Building forensics, home performance testing, diagnostic analysis of residential buildings	8	corbett@buildingperformanceworkshop.com 773-271-5310

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	100+
	Years in Sales Training Related to Energy Efficiency, HVAC Equipment, Performance Operations, Market Barriers and Sales Strategies	6
	Client Types: Manufacturer, Distributor, Utility, Contractor, Non-Profit, Building Owners and Operations, Contractor Assn	Contractors, Inspectors, Builders, Building Owners/Operators, Non-Profits
	Number of Staff Members (and/or subconsultants utilized)	1
	Local, Regional, State Territories	USA
	Instructor References	Lew Harriman (ASHRAE Fellow), Thom Phillips (H4H Michigan), Larry Zarker (BPI), Brett Welch (Knauf Insulation), Ryan Hoger (TEC Mungo)
MARKET FOCUS OPTION		COMMENTS
Market Focus (Audience)	Residential	Specialization in residential
	Light Commercial	Much the same as residential
COURSE TOPIC OPTION		COMMENTS
Course Topic	Technical HVAC Training	Forensics and performance testing
	HVAC Workforce Sales Training with Technical Emphasis	Specializing in whole-home solutions
	HVAC Workforce Sales Training with Non-Technical Emphasis	
	Whole House Building Science and/or Energy Efficiency Sales Training	Wrote the book 'Home Performance Diagnostics: the Guide to Advanced Testing'
	Energy Efficiency	A side effect of good performance
Marketing and Communication Tools & Training (web, marketing, social media)		
TRAINING COURSE FORMAT CRITERIA		REPORTED INFORMATION
Training Course Format	Class Length	Customized, 1 hour, 3 hour, full day, week, 6-week (all on understanding and using performance testing to make homes better)
	Student Goals and Objectives	Performance Testing, Teaching Clients, Whole-Home Analysis, Boosted Profitability and Effectiveness in the Private Market
	Student Testing & Evaluation Criteria	Varies
DELIVERY METHOD OPTION		COMMENTS
Delivery Method	Online Live Web Cast	GoTo webinars monthly, weekly webcasts for Fall Fast Track
	Online Recorded Web Cast (on Demand) or Online Library	http://youtube.com/c/homeperformance
	Onsite Classroom Course instruction	Lots and lots

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	Onsite Hands-on Lab Sessions	Love this more than classroom
	Field Site Training Sessions	Better than anything else on this list
	Remote Coaching	Via videoconference/video phone
COURSE CONTENT OBJECTIVE OPTION		COMMENTS
	SYSTEM PERFORMANCE: Awareness of technical HVAC Baselines (ACCA, ASHRAE 180....State and National Workforce Certification(s))	Trained students to BPI/ACCA/Weatherization standards for years
	VALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions (Direct Energy Savings, Non-Energy Benefits)	Focus on non-energy benefits always. Energy takes a backseat.
	MARKET GROWTH KSA's: Knowledge, Skills and Ability (KSA's)/Competencies to effect market growth and end-user engagement	Work exclusively outside public programs- private market coaching only
	BENCHMARKING, COMMISSIONING and RECOMMISSIONING	Hence the diagnostics
TAKE AWAY/RESOURCE MATERIAL OPTION		COMMENTS
Take Away/Resource Material (tools, equipment, software, etc.)	Copies of Slides Presented	
	Client Post Installation Follow-Up Templates	
	Sample Client Post Installation Follow-Up Reports	http://homeperformancereports.com
	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		REPORTED INFORMATION
Participant Evaluation of Instructor and Training Course	Evaluation Method	Written
	Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent)	Varies
	Participant Testimonials	http://buildingperformanceworkshop.com/about/testimonials
FOLLOWUP CRITERIA		Comments
Followup Systems Leading to Implementation	Coaching (Telephone/Online/Discussion Forums/Group Conferences)	This is best seen in my Fall Fast Track Mastermind Course
	Implementation Evaluation Tools/Systems	http://homeperformance.training
	Training Course and Instructor Data Tracking	
	Ongoing Engagements	