

Sales Training Provider Criteria Form

as of November 20, 2014

TRAINING ORGANIZATION

<i>Organization Name</i>	Con-Com-T Inc.	<i>Primary Contact</i>	Jay Gentry
<i>Physical Street Address</i>	26650 Rancho San Carlos Road	<i>Contact Phone</i>	831-626-1340
<i>City, State Zip</i>	Carmel, CA 93923	<i>Email Address</i>	jay@concomt.com
<i>Business Structure</i>	C Corporation	<i>Survey Date</i>	2/2/2015
<i>Main Phone</i>	8316261340	<i>Surveyed By</i>	Daniel Jones
<i>Website</i>	Concomt.com	<i>Isat Update Date</i>	2/11/2015

<i>Instructor Name(s)</i>	<i>Primary Expertise</i>	<i>Years of Training Experience</i>	<i>Email Address</i>
Jay Gentry	Sales (Consultative and Strategic), Sales Management, Marketing, Business Planning Customer Listening Events such as Idea Exchanges or Advisory Councils	40	jay@concomt.com 831-626-1340

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 in classrooms, 200 on webinars, 600 during National Sales/Business Owner's Meetings	
	Years in Sales Training Related to Energy Efficiency, HVAC Equipment, Performance Operations, Market Barriers and Sales Strategies	18 in Energy Efficiency, 8 in HVAC, 40 in Performance Operations, Market Barriers and Sales Strategies	
	Client Types: Manufacturer, Distributor, Utility, Contractor, Non-Profit, Building Owners and Operations, Contractor Assn	All of those listed plus "in-home" and several others. Common ground is Conceptual selling based on customer value proposition	
	Number of Staff Members (and/or subconsultants utilized)	0... Independent contractor	
	Local, Regional, State Territories	Have trained all over the US	
MARKET FOCUS OPTION		IS THE OPTION OFFERED?	COMMENTS
Market Focus (Audience)	Residential	Yes	This would be the in-home selling
	Light Commercial	Yes	
	Heavy Commercial	Possibly	
	Utility Programs	Yes	
	Municipal	Yes	
COURSE TOPIC OPTION			
Course Topic	HVAC Workforce Sales Training with Non-Technical Emphasis		
	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	From 90 minutes through 3 Days	
	Pre-requisites	My work is customized to the client need so there is a lot of flexibility	
	Student Goals and Objectives	Usually knowledge goals and sometimes skill related objectives	
	Student Testing & Evaluation Criteria	Optional	
DELIVERY METHOD OPTION			
Delivery Method	Online Live Web Cast		
	Online Recorded Web Cast (on Demand) or Online Library		
	Onsite Classroom Course instruction		

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Onsite Hands-on Lab Sessions		
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	Maybe
	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	
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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
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Participant Evaluation of Instructor and Training Course	Evaluation Method	Class Survey, Field Survey after time in field
	Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent)	I like to ask for applicability and was the time invested worth it
	Participant Testimonials	Could also provide Client testimonials

	FOLLOWUP CRITERIA	
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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	

My work is custom and/or tailored to the client so no specific course names. Course titles often include Consultative Selling, Strategic Selling, Effective Listening.

TRAINING ORGANIZATION

Organization Name

Primary Contact

NOTE: The information below is detailed for the specified training course. Additional training courses are detailed on separate, subsequent tabs. (SALES TRAINER, PLEASE COPY AND PASTE THIS TAB TO DETAIL ADDITIONAL COURSES.)

Training Course Name	My work is custom and/or tailored to the client so no specific Course Names... Course titles often include Consultative Selling, Strategic Selling, Effective Listening		
	COURSE TOPIC OPTION	IS THE OPTION OFFERED?	COMMENTS
Course Topic <i>(This includes specialties for Residential, Light Commercial, Heavy Commercial, Municipal, and Utility within each focus option.)</i>	Technical HVAC Training		
	HVAC Workforce Sales Training with Technical Emphasis		
	with Non-Technical Emphasis		
	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		
	Pre-requisites		
	Student Goals and Objectives		
	Student Testing & Evaluation Criteria		
	DELIVERY METHOD OPTION	IS THE OPTION OFFERED?	COMMENTS
Delivery Method	Online Live Web Cast		
	Online Recorded Web Cast (on Demand) or Online Library		
	Onsite Classroom Course instruction		
	Onsite Hands-on Lab Sessions		
	Field Site Training Sessions		
	Remote Coaching		
	COURSE CONTENT OBJECTIVE OPTION	IS THE OPTION OFFERED?	COMMENTS
Course Content Objective	PROGRAMS: Awareness of IOU QI/QM/QR Service Programs		
	SYSTEM PERFORMANCE: Awareness of technical HVAC Baselines (ACCA, ASHRAE 180....State and National Workforce Certification(s))		
	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		
	BENCHMARKING, COMMISSIONING and RECOMMISSIONING		
	TAKE AWAY/RESOURCE MATERIAL OPTION	IS THE OPTION OFFERED?	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		

Sales Training Provider COURSE Info.

as of November 20, 2014

(The information on this form is based on WHPA WE&T Sales - SMART Goal 6 Exploratory Working Group and HVAC WE&T Committee discussions from June, 2014 thru October, 2014)

PLEASE SUBMIT THE COMPLETED FORM TO WHPA STAFF AT: wendy@performancealliance.org

	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	COMMENTS
Participant Evaluation of Instructor and Training Course	Evaluation Method		
	Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent)		
	Participant Testimonials		
	FOLLOWUP CRITERIA	REPORTED INFORMATION	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		

(COPY AND PASTE THIS TAB FOR ADDITIONAL COURSES.)