

Sales Trainer Criteria

as of October 8, 2014

| TRAINING ORGANIZATION | | | |
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| <i>Organization Name</i> | National Comfort Institute, Inc. | <i>Primary Contact</i> | David Holt |
| <i>Physical Street Address</i> | 4529 Lake Road | <i>Contact Phone</i> | 706-332-2212 |
| <i>City, State Zip</i> | Sheffield Lake, OH 44015 | <i>Contact FAX</i> | 866-508-7058 |
| <i>Mailing Address</i> | PO Box 147 | <i>Email Address</i> | davidh@ncihvac.com |
| <i>City, State Zip</i> | Avon Lake, OH 44012 | | |
| <i>Business Structure</i> | C Corporation | | |
| <i>Website</i> | www.nationalcomfortinstitute.com | | |
| <i>Instructor Name(s)</i> | <i>Primary Expertise</i> | <i>Years of Training Experience</i> | <i>Contact Information</i> |
| David Holt | Residential Sales, Business Management | 30 | david@ncihvac.com 706-332-2212 |
| John Garofalo | Business Management & Leadership | 40 | johng@ncihvac.com 713-857-9701 |
| 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. | | | |
| ORGANIZATION RESUME CRITERIA | | REPORTED INFORMATION | |
| Organization Resume | Number of Participants Trained Per Year | 3,010 (2013) 1,979 (2014 YTD) | |
| | Years in Sales Training Related to Energy Efficiency, HVAC Equipment, Performance Operations, Market Barriers and Sales Strategies | 20 | |
| | Client Types: Manufacturer, Distributor, Utility, Contractor, Non-Profit, Building Owners and Operations, Contractor Assn | Manufacturer, Distributor, Utility, Contractor | |
| | Number of Staff Members (and/or subconsultants utilized) | 30 | |
| | Local, Regional, State Territories | International (US and Canada) | |
| MARKET FOCUS OPTION | | COMMENTS | |
| Market Focus (Audience) | Residential | | |
| | Light Commercial | | |
| | Heavy Commercial | Through National Balancing Council sister organization | |
| | Utility Programs | NCI is an SCE consultant intimately familiar with CQM and CQR. | |
| | Municipal | | |
| COURSE TOPIC OPTION | | COMMENTS | |
| Course Topic | Technical HVAC Training | Several courses not offered by typical manufacturer/distributor | |
| | HVAC Workforce Sales Training with Technical Emphasis | | |
| | HVAC Workforce Sales Training with Non-Technical Emphasis | | |
| | Whole House Building Science and/or Energy Efficiency Sales Training | Including BPI Certification Exams | |
| | Energy Efficiency | | |
| | Marketing and Communication Tools & Training (web, marketing, social media) | Through downloads and ContractorsIMAGE division | |
| | Lead Generation | | |
| Business Growth Training | | | |

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| TRAINING COURSE FORMAT CRITERIA | | REPORTED INFORMATION |
|--|---|---|
| Training Course Format | Class Length | 2 days |
| | Pre-requisites | None |
| | Student Goals and Objectives | Yes |
| | Student Testing & Evaluation Criteria | Yes |
| DELIVERY METHOD OPTION | | COMMENTS |
| Delivery Method | Onsite Classroom Course instruction | Yes |
| | Onsite Hands-on Lab Sessions | Yes |
| | Field Site Training Sessions | Optional |
| COURSE CONTENT OBJECTIVE OPTION | | 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) | |
| | 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 | 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 | |
| | Delivery formats for materials: | |
| | Hard Copy | Spiral-bound workbook included |
| | Electronic via email one-time transactions | Email forms during and after classes |
| EVALUATION CRITERIA | | REPORTED INFORMATION |
| Participant Evaluation of Instructor and Training Course | Evaluation Method | Post-class evaluation form |
| | Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent) | Computed at home office |
| | Participant Testimonials | Requested |
| FOLLOWUP CRITERIA | | Comments |
| Followup Systems Leading to Implementation and Persistence of Message | Coaching (Telephone/Online/Discussion Forums/Group Conferences) | |
| | Implementation Evaluation Tools/Systems | ComfortMaxx software |
| | Training Course and Instructor Data Tracking | Internally tracked |
| | Ongoing Engagements | |

| Training Course Name | Performance-Based Selling | |
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| | COURSE TOPIC OPTION | COMMENTS |
| Course Topic | HVAC Workforce Sales Training with Non-Technical Emphasis | |
| | Energy Efficiency | |
| | Marketing and Communication Tools & Training (web, marketing, social media) | Several samples and digital files provided |
| | Lead Generation | Based on system performance testing |
| | Business Growth Training | Encourages teamwork and business growth |
| | TRAINING COURSE FORMAT CRITERIA | REPORTED INFORMATION |
| Training Course Format | Class Length | 2 days |
| | Pre-requisites | None required, but HVAC System Performance training a plus |
| | Student Goals and Objectives | Yes |
| | Student Testing & Evaluation Criteria | Yes |
| | DELIVERY METHOD OPTION | COMMENTS |
| Delivery Method | Onsite Classroom Course instruction | |
| | Onsite Hands-on Lab Sessions | Role play excercises and implementation planning sessions |
| | Field Site Training Sessions | Optional |
| | Remote Coaching | Optional |
| | COURSE CONTENT OBJECTIVE OPTION | COMMENTS |
| Course Content Objective | VALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions (Direct Energy Savings, Non-Energy Benefits) | Focuses on Safety, Health, Comfort & Efficiency |
| | 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 | Focuses on single-family residential marketplace initiatives |
| | 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 | Entire program built on foundation of quality and integrity |
| | TAKE AWAY/RESOURCE MATERIAL OPTION | COMMENTS |
| Take Away/Resource Material | Job Pricing Templates | Upfront pricing system examples discussed |
| | Sample Job Pricing | Included in workbook |
| | Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.) | Provided digitally so students can easily customize to fit their business |
| | Sample Sales Transaction Documents | Included in workbook |
| | Delivery formats for materials: | |

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| | Hard Copy | Spiral-bound workbook included |
| | Electronic via email one-time transactions | Email forms during and after classes |
| EVALUATION CRITERIA | | COMMENTS |
| Participant Evaluation of Instructor and Training Course | Evaluation Method | Post-class evaluation form |
| | Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent) | Computed at home office |
| | Participant Testimonials | Requested |
| FOLLOWUP CRITERIA | | Comments |
| Followup Systems Leading to Implementation and Persistence of Message | Coaching (Telephone/Online/Discussion Forums/Group Conferences) | |
| | Implementation Evaluation Tools/Systems | ComfortMaxx software |
| | Training Course and Instructor Data Tracking | Internally tracked |
| | Ongoing Engagements | |

| Traning Course Name | Performance-Based System Renovation Sales | |
|---|--|--|
| COURSE TOPIC OPTION | | COMMENTS |
| Course Topic | HVAC Workforce Sales Training with Non-Technical Emphasis | |
| | Energy Efficiency | |
| | Marketing and Communication Tools & Training (web, marketing, social media) | Several samples and digital files provided |
| | Lead Generation | Based on system performance testing |
| | Business Growth Training | Encourages teamwork and business growth |
| TRAINING COURSE FORMAT CRITERIA | | REPORTED INFORMATION |
| Training Course Format | Class Length | 15 x 90 minute sessions (online), 3 days a week for 5 weeks |
| | Pre-requisites | None required, but HVAC System Performance training a plus |
| | Student Goals and Objectives | |
| | Student Testing & Evaluation Criteria | |
| DELIVERY METHOD OPTION | | COMMENTS |
| Delivery Method | Online Live Web Cast | 90 minute sessions, 3 days/week, 5 weeks |
| | Online Recorded Web Cast (on Demand) or Online Library | |
| | Onsite Classroom Course instruction | 3 continuous days if presented live |
| | Onsite Hands-on Lab Sessions | Role play excercises and implementation planning sessions |
| | Field Site Training Sessions | Optional |
| | Remote Coaching | Optional |
| COURSE CONTENT OBJECTIVE OPTION | | COMMENTS |
| Course Content Objective | VALUE PROPOSITIONS: Awareness of Market Barriers and Value Propositions (Direct Energy Savings, Non-Energy Benefits) | Focuses on Safety, Health, Comfort & Efficiency |
| | 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 | Focuses on single-family residential marketplace initiatives |
| | 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 | Entire program built on foundation of quality and integrity |
| TAKE AWAY/RESOURCE MATERIAL OPTION | | COMMENTS |
| | Job Pricing Templates | Upfront pricing system examples discussed |
| | Sample Job Pricing | Included in workbook |

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|--|---|---|
| Take Away/Resource Material | Client Post Installation Follow-Up Templates | Included in workbook |
| | Sample Client Post Installation Follow-Up Reports | Included in workbook |
| | Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.) | Provided digitally so students can easily customize to fit their business |
| | Sample Sales Transaction Documents | Included in workbook |
| | Delivery formats for materials: | |
| | Hard Copy | Spiral-bound workbook included |
| | Electronic via email one-time transactions | Email forms during and after classes |
| | Electronic via email online/on-demand availability | Available to students only |
| EVALUATION CRITERIA | | REPORTED INFORMATION |
| Participant Evaluation of Instructor and Training Course | Evaluation Method | Post-class evaluation form |
| | Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent) | Computed at home office |
| | Participant Testimonials | Requested |
| FOLLOWUP CRITERIA | | Comments |
| Followup Systems Leading to Implementation and Persistence of Message | Coaching (Telephone/Online/Discussion Forums/Group Conferences) | |
| | Implementation Evaluation Tools/Systems | ComfortMaxx software |
| | Training Course and Instructor Data Tracking | Internally tracked |
| | Ongoing Engagements | |

| Training Course Name | Residential System Performance | |
|---|--|---|
| COURSE TOPIC OPTION | | COMMENTS |
| Course Topic | Technical HVAC Training | Advanced understanding of proper HVAC system operation and performance in the |
| | HVAC Workforce Sales Training | |
| | with Technical Emphasis | |
| | with Non-Technical Emphasis | |
| | Energy Efficiency | |
| | Marketing and Communication Tools & Training (web, marketing, social media) | Several samples and digital files provided |
| | Lead Generation | Based on system performance testing |
| Business Growth Training | Encourages teamwork and business growth | |
| TRAINING COURSE FORMAT CRITERIA | | REPORTED INFORMATION |
| Training Course Format | Class Length | 2 days |
| | Pre-requisites | None |
| | Student Goals and Objectives | Yes |
| | Student Testing & Evaluation Criteria | Yes |
| DELIVERY METHOD OPTION | | COMMENTS |
| Delivery Method | Onsite Classroom Course instruction | |
| | Onsite Hands-on Lab Sessions | Static pressure and temperature measurement labs |
| | Field Site Training Sessions | Optional |
| | Remote Coaching | Optional |
| COURSE CONTENT OBJECTIVE OPTION | | 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) | Focuses on Safety, Health, Comfort & Efficiency |
| | 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 | Focuses on single-family residential marketplace initiatives |
| | 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 | Entire program built on foundation of quality and integrity |
| TAKE AWAY/RESOURCE MATERIAL OPTION | | COMMENTS |

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|--|---|----------------------------------|
| Take Away/Resource Material (tools, equipment, software, etc.) | Other Sales Transaction Templates (questions to ask, proposals, cross-selling checklists, etc.) | Delivered via CD to each student |
| | Delivery formats for materials: | |
| | Hard Copy | Spiral-bound workbook included |
| | Electronic via email one-time transactions | Delivered via CD to each student |
| EVALUATION CRITERIA | | REPORTED INFORMATION |
| Participant Evaluation of Instructor and Training Course | Evaluation Method | Post-class evaluation form |
| | Summary Scores of End Course Evaluations (IOU's Standardized Evaluation Summary or Equivalent) | Computed at home office |
| | Participant Testimonials | Requested |
| FOLLOWUP CRITERIA | | Comments |
| Followup Systems Leading to Implementation and Persistence of Message | Coaching (Telephone/Online/Discussion Forums/Group Conferences) | |
| | Implementation Evaluation Tools/Systems | ComfortMaxx software |
| | Training Course and Instructor Data Tracking | Internally tracked |
| | Ongoing Engagements | |