# Selling Energy
## Online Training Course Catalog

### Presented by Mark Jewell

**Mark Jewell** is a nationally recognized subject matter expert, coach, speaker, and best-selling author focused on applying energy efficiency to create value. He is focused on helping others to overcome the barriers to implementing projects. As co-founder and President of **Selling Energy**, he teaches other professionals and organizations how to turbocharge their sales success. Through his monthly coaching calls and daily Selling Energy blog, Mark Jewell provides ongoing support for students putting these principles into practice.

**Selling Energy** offers award-winning in-person and online training programs so students can become better sales professionals and advance their careers. Each offering makes attendees more successful the very next day, by delivering the skills and insights proven to move efficiency projects forward most effectively. The Selling Energy curriculum artfully combines instruction on professional selling, energy efficiency sales, financial analysis, and segment-specific business acumen.

This **Course Catalog** provides details about the online training content available at www.SellingEnergy.com. Courses are free for individuals who meet the stated eligibility rules of our sponsors, as listed on our website under the heading “Sponsored Online Training.” Anyone who does not meet a sponsor’s definition for eligibility can still purchase a course from Selling Energy directly, at the non-sponsored rate.

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Questions? Need help getting signed up? Interested in a group discount? Email us at info@sellingenergy.com or call us at 415-814-3744.

Who can benefit? Efficiency products manufacturers, dealers and distributors; mechanical and electrical contractors; energy-efficiency specialists; architects, engineers, lighting designers; building owners and managers; utility representatives; commissioning authorities; and anyone else whose success depends on the effective advocacy of efficiency projects. This training is also beneficial for anyone who lobbies for expense-reducing capital projects or sets metrics for encouraging or approving energy projects.

## Online Course Options:

## 1. Learning to S.E.E.: Sell Efficiency Effectively™

Most decisions are emotional decisions, and making energy-efficiency purchases and changes are no exception. Whether you’re selling efficiency solutions or seeking project approvals, understanding which factors play a role in the decision-making process and knowing how to build rapport with key stakeholders vastly increase your odds of success. Learning to S.E.E. is a “pasta sampler” version of the more comprehensive, weeklong in-person Efficiency Sales Professional™ (ESP™) Certificate Program. It provides the insights, focus, and skills you need to grow your market share, revenues, and profitability.

LEARN TO:

1. Understand the true value of efficiency as manifested in all three categories of benefits: utility-cost financial, non-utility-cost financial, and non-financial
2. Appreciate the pros and cons of various approaches to analyzing the financial benefits of expense-reducing capital projects
3. Understand the importance of properly qualifying prospects for efficiency projects
4. Know how to capture and retain your prospect’s attention with the help of a custom-tailored 15-second elevator pitch, a one-page narrative proposal, and a

one-page financial analysis that utilizes the proper metrics to justify the project

5. Overcome more than two dozen myths that can stymie worthwhile efficiency initiatives

Extras: Those registering for this training course will be mailed the Learning to S.E.E. Playbook, the textbook used by students attending the in-person version of this training. The Playbook contains slides, tip sheets, templates, exercises, and other valuable reprints. Registrants will also be extended a free one-year membership to the Ninja Network; members are invited to attend the Ninja Network Coaching Call sessions led each month by Mark Jewell.

## 2. Financial Analysis of Energy Efficiency Projects

Are you new to financial analysis? Do you need a refresher on the financial terminology and approaches used when evaluating expense-reducing capital projects? Do you (or your customers) evaluate an energy efficiency project only by its simple payback period? This training explores the financial terminology and approaches used to evaluate projects, and includes instruction on using Selling Energy's financial analysis templates provided in the form of MS Excel worksheets.

LEARN TO:

1. Model expected cash flow inflows and outflows over time in a transparent and concise format
2. Evaluate a project's financial return with metrics other than simple payback period, return on investment or internal rate of returnCalculate a project's proper metrics, such as its net present value, modified internal rate of return, and savings-to-investment ratio
3. Generate compelling capital budget requests

In addition to understanding how to calculate various financial metrics for a proposed project, participants will also understand how to interpret, critique and present those projected results.

Extras: Those registering for this training course be extended a free one-year membership to the Ninja Network; members are invited to attend the Ninja Network Coaching Call sessions led each month by Mark Jewell. Additionally, downloadable Excel Financial Analysis spreadsheet templates are provided, so that students may follow along with the exercises Mark goes through in the online course.

## 3. Taking Control of Your Energy Use

Energy is not a fixed cost. This class will explore a variety of topics that together will help plot a course to more effective energy management.

LEARN TO:

1. Examine your energy use in terms of “what is” and “what could be”
2. Identify the range of behavioral, low/no-cost, and capital-intensive approaches available to building owners and managers
3. Make use of best practices for identifying audit approaches and qualified energy professionals
4. Measure what you hope to manage, setting targets, and documenting your progress
5. Build internal support for your projects

## 4. Making Efficiency Happen

This class builds on the concepts presented in "Taking Control of Your Energy Use." As the title suggests, it provides a roadmap for making efficiency happen.

LEARN TO:

1. Formulate the justification for improving building energy performance
2. Rally the support of capital budgeting and other internal stakeholders
3. Evaluate and select the energy services resources needed to accomplish the improvements
4. Identify and capture any available "free money" to help fund the campaign
5. Measure the results
6. Market the successes - both internally (to support more projects) and externally (to enhance public relations, attract/retain tenants and customers, etc.)

## 5. Leveraging Benchmarking to Build Your Business

Professionals in the energy industry benefit from expanding their suite of existing services to include Benchmarking because documenting a building’s energy performance helps clarify the need for enhancing energy efficiency.

LEARN TO:

1. Convince prospects of the need for your services
2. Demonstrate that past retrofits have produced real savings, even if utility bills have increased in the wake of the project (due to changes in utility rates, occupancy patterns, weather, and/or other factors)
3. Cross-sell in the context of both existing and prospective customer relationships

The potential to offer benchmarking services for a fee extends far beyond existing customers, and the borders of one state. Communities across the US are mandating energy-performance benchmarking using ENERGY STAR© Portfolio Manager©. Many building owners require the assistance of third parties to help them comply with these regulations. Since one can benchmark a building remotely, entrepreneurs, architects, engineers, and other professions are well-positioned to provide these services wherever such requirements exist.

## 6. The Ultimate (Online) Guide to Benchmarking with ENERGY STAR© Portfolio Manager©

The Ultimate Guide to Benchmarking is comprised of a series of short training modules, each of which addresses a specific topic related to energy benchmarking. It takes a “create your own adventure” approach to teaching both building owners and the professionals who serve them how to use ENERGY STAR Portfolio Manager. This online/on-demand training system will provide you with the level of detail you need in a convenient and time-efficient manner. You can experience one or two modules to gain awareness. You can focus on the module(s) that relate to your particular property type(s). Or you can view every module and become the benchmarking maven in your own organization, or even begin offering benchmarking services for a fee.

LEARN TO:

1. Benchmark your property’s energy performance – perfect for building owners
2. Identify buildings in your portfolio most in need of efficiency improvements – perfect for managers or solutions providers
3. Understand how new benchmarking mandates affect whole-building sales, leases, financing, and refinancing – perfect for brokers

## 7. Learning to S.E.E.: Sell Efficiency Effectively™ (Residential)

Most decisions are emotional decisions, and making efficiency-related purchases is no exception. Understanding what factors play a role in the decision-making process and knowing how to build rapport with your prospects and customers will vastly increase your odds of success. Learning to S.E.E. is a “pasta sampler” version of the more comprehensive Efficiency Sales Professional™ (ESP™) Program. This fast-paced program will provide you with the insights, focus, and skills you need to grow your market share, revenues, and profitability.

Whether you’re a home performance contractor, efficiency product dealer/distributor, energy efficiency specialist, HVAC/lighting designer, engineer, or architect, this training will arm you with the knowledge, tools, and wisdom to move more of your projects forward. This workshop features proven strategies for advancing energy efficiency in residential settings, with content specifically tuned to the unique challenges home performance contractors face, including how to lower project first costs by leveraging rebates and other incentives. This program explores the following topics and more…

- Understanding and selling *all* of the benefits of enhanced efficiency (utility cost, non-utility-cost financial, and non-financial)
- Appreciating the differences in decision-making drivers among homeowners, landlords, and tenants
- Generating leads and networking
- Anticipating and addressing myths and objections
- Communication strategies and tactics, including the value of a well-crafted "elevator pitch"
- Understanding your prospects and building rapport
- Field-tested strategies for successful in-home selling
- Developing a one-page proposal
- Calculating a project's true return, including life-cycle cost where applicable
- Distilling the costs/benefits into a concise one-page financial summary emphasizing the right metrics
- Finding and highlighting the "free money" to help reduce or eliminate first cost
- Selected additional topics on selling in HVAC markets (e.g., small commercial)

Extras: Those registering for this training course will be mailed the Residential version of the Learning to S.E.E. Playbook, the textbook used by students attending the in-person version of this training. The Playbook contains slides, tip sheets, templates, exercises, and other valuable reprints. Registrants will also be extended a free one-year membership to the Ninja Network; members are invited to attend the Ninja Network Coaching Call sessions led each month by Mark Jewell.

**The following titles are Under Development, and registrants will be wait-listed. Licenses will be distributed first come, first served, once this content is available, while supplies last. Tentative release timing is late 2016.**

## 8. Creating Value with Energy Efficiency in Landlord/Tenant Settings

It can be challenging to get energy projects approved in landlord/tenant settings given the many different lease types that define "who pays" versus "who benefits," myths surrounding "split incentives," and other issues. As the title suggests, this workshop will provide a roadmap for making efficiency happen in these complex settings. You will learn strategies and tactics that not only increase your odds of getting a "yes," but also shorten the approval process:

- Pre-qualifying properties to find the best prospects for efficiency improvements
- Identifying and addressing each of the many influencers and decision-makers including building ownership, property management, tenants and others

- Reframing the benefits and fine-tuning your communication so that all stakeholders are motivated to collaborate productively and move efficiency forward
- And much more!

You will leave this session with the skills and insights needed to advance efficiency effectively in landlord/tenant settings. **(Available for wait list only)**

## 9. Market Segmentation, Lead Generation and Account Development

It has been said that 60% of sales success depends on who you call, 30% on what you say, and 10% on everything else. This hands-on workshop will present systematic approaches to defining your competitive advantage, refining your value proposition, and profiling your ideal customers so that you can focus on cloning them. It will also provide a bounty of proven strategies and tactics for expanding relationships with existing customers and finding new ones, including but not limited to organized referral campaigns; networking with non-competitive vendors; and, advanced segmentation and outreach strategies. **(Available for wait list only)**

## 10. Winning with High-Performance Communication Skills

This fast-paced workshop will explore and demonstrate a multitude of skills that are vital to attracting prospects, securing new clients, and nurturing existing ones. Active listening improves the quality of bilateral communication and sets the stage for higher-quality customer interactions. In complex decision-making settings, the ability to manage multiple stakeholders and gain agreement helps shorten sales cycles and increase closing ratios. Overcoming (or preemptively neutralizing) myths and objections is essential to showcasing a project's true merits. Designing streamlined presentation decks and marketing materials helps capture attention and engage decision-makers. Creating up-to-date Story Archives allows a sales organization to convert its "oral tradition" to "written tradition" and helps sales veterans and novices alike prosper from the organization's continually evolving collection of "seven-second success stories." Expertly balancing in-person, phone and email interactions helps keep the sales process moving forward both time-efficiently and cost-effectively. Thoughtfully crafted blogs, podcasts, and newsletters demonstrate thought leadership, building credibility and generating inbound leads. Attendees are welcome to bring their own communication samples to the workshop for constructive critique. **(Available for wait list only)**

## 11. Energizing Your Sales Culture Using Learning to S.E.E.: Sell Efficiency Effectively™ Principles (Sales Management)

Every success strategy requires a success mechanism. Sales managers will benefit greatly from attending this workshop on applying the proven success strategies featured in Learning to S.E.E.: Sell Efficiency Effectively™. Each of the following topics will be addressed, supplemented by supporting templates and exercises where appropriate:

reframing the benefits of efficiency so they can be measured with a prospect's own segment-specific success yardsticks; generating in-house templates that greatly simplify the creation of compelling one-page proposals; ensuring that elevator pitches are both prospect-specific and congruent across the organization; creating, maintaining and deploying Story Archives and Objections Archives to empower sales resources with "muscle memory"; cross-selling and upselling with intention; maximizing and tracking referrals; deputizing non-sales roles to better support business development; creating a culture of continual professional development; instilling business acumen in all sales resources; running high-performance sales meetings; and, assigning reading, exercises, and metrics to sales teams using "drip-irrigation" content reinforcement and transparent accountability. **(Available for wait list only)**

## 12. Fine-Tuning Your Team of Efficiency-Focused Sales Professionals

Effective sales management is a mixture of art and science. This fast-paced workshop will provide sales leaders with proven approaches for planning and deploying strategies that maximize their sales teams' productivity and morale. Each of the following topics will be explored, supplemented by supporting templates and exercises where appropriate: defining market segments, targets and territories; selecting ideal approaches to forecasting, metrics and CRM; optimizing compensation plans; recruiting, motivating and coaching to win; and, empowering sales resources to leverage rebates and incentives to support the adoption of premium-efficiency solutions. **(Available for wait list only)**

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