



Residential Distributor Planning Packet and Registration Form

Honeywell

S.T.E.P.S. to Success Sales Training Workshop



Class Overview:

Honeywell is proud to introduce its newest sales training workshop, S.T.E.P.S. to Success.

This introductory sales-focused course is designed to teach Residential and Light Commercial contractor professionals how to engage their customer base by providing customized product and service offerings that their customers want, need and will pay for. Whether it's through increased accessory sales, higher-end system installations or more service enhancements, contractor professionals that attend S.T.E.P.S. to Success can increase their ability to close more business, increase their average ticket price and secure long-lasting customer relationships.

What is S.T.E.P.S. to Success?

The term "S.T.E.P.S." stands for an easily recallable acronym that can help service and sales professionals maximize their time while in the customer's home or business. The S.T.E.P.S. acronym breaks the service and sales process into five core components that emphasize the customer and helps establish an increased level of trust, rapport and credibility.

S - Start the conversation

T - Tell a story

E - Engage the customer

P - Provide the right solution

S - See it through

These core components will be expanded in a classroom environment through a blended learning experience that includes lectures, workshops and other interactive activities that help contractor professionals – regardless of years of experience – internalize the content and build their sales abilities

Course Topics:

- Redefining the sales process and what it means for your company and for your customer
- Ensuring techs and sales people are properly preparing for customer visits to create opportunities for better, more consistent results while in the home or business
- Observing the customer's environment for signs of service and product needs
- Taking industry jargon such as SEER, MERV, CFM and GPM and translating it into value that the customer will pay for
- Providing the right solution and seeing it through
- Increasing customer satisfaction and cultivating long-term profitable relationships

Who Should Attend:

Residential/Light Commercial HVAC and plumbing contractor owners, service and install technicians and sales professionals looking for ways to grow their business, differentiate themselves from the competition and maximize the value they bring to the customer.

While not required, we highly recommend having the Distributor Sales Staff join the class! This is the perfect opportunity for your team to identify customers that have growth potential and learn alongside them.

Class Length:

You can choose either a one-day class or host two consecutive, single-day classes. Each training session will last approximately 7-8 hours in length (including time for breaks and lunch/dinner).

If you choose to host two single-day sessions, we recommend holding one class for the service/install technicians and the other for the contractor sales staff. Contractor owners and managers can attend either session; the same holds true for your distributor sales staff.

Class timing is flexible, please contact the Honeywell Sales Excellence and Training Team with any questions.

The S.T.E.P.S. to Success sales training class is not a technical or product training course.

Your Role in Planning and Promoting a S.T.E.P.S. Training Workshop:

1. Complete the attached class registration form and email to trainingteam@honeywell.com
2. Be sure that your company contact has a method in place for obtaining contractor registration and payment
3. Determine the tuition amount you will be charging for the class.
 - As a distributor host, you pay a flat fee of either **\$7,000** for one day class or **\$11,500** for two single day classes. Your fee includes the 7-8 hour training session(s), all in-class materials, and trainer accommodations.
 - Class tuition should cover all in-class materials and food and beverage (if you choose to offer during the class).

Tuition can be co-op'd with Contractor PRO™ points, or you, as the distributor, can "sponsor" contractors using your MDF funds."

 - Remember that the class size is limited to 40 people/day, which includes any internal staff you'd like to attend the course. Keep this in mind when determining your tuition rates and food and beverage amounts.

A minimum of 10 attendees required; over 40 attendees per day will incur an additional fee of \$150/attendee; this does not include additional food/beverage costs.
4. In the weeks prior to class be sure to follow up with your attendees, using the email template provided by Honeywell, to ensure they are aware of class timing, location, and materials needed (notepad/pen). The communication should also describe what will be provided (in-class materials, meals, etc.)

Class Materials Checklist:

As the class host, you will be responsible for providing the following:

- Safe, clean room that is large enough for the group/trainers to sit and work comfortably
- Projection screen and power source for presenter's laptop and projector
- Name tags/table tents
- Easels with flip chart and markers:
 - 1 - for front of classroom
 - 1 - for each group of attendees (6 - 8 people)
- Registration area/table for attendee check-in
- The Honeywell Sales Excellence and Training Team will provide all in-class materials such as workbooks, worksheets, goal sheets, etc. and will ship them to the address provided in your registration form prior to the class



Recommended Class Planning Timeline

We recommend setting your date and working backward to determine when you'll need to start the planning/promotion of your class.

2 Months Prior:

- Hold planning webcast with the Honeywell training team and your in-house management/planning team – scheduling information will be included in the confirmation email via the email address you provide in registration form.
- Finalize list of target attendees and compile marketing/promotional activities:
 - Create regional target lists for each sales team and have them reach out directly to individual dealers
 - We suggest creating “Tiered” lists of customers to ensure you’re getting the customers with the most potential/ROI registered first
- Complete provided contractor flyer with class information
- Develop timeline of when marketing/promotional activities will happen
- Hold a planning meeting with management/and territory managers to ensure marketing/promotional activities, target lists and expectations are clearly understood

1 ½ Months Prior:

- Launch marketing/promotional activities (flyers, email blasts, direct mail, etc.)
- TM's reach out to target lists and hand-deliver registration forms
 - *SUGGESTION: Create some friendly internal competition by offering a monetary prize for the first person to get everyone on their list signed up (or the most by a certain date)*

1 Month Prior:

- If using hotel/outside venue, book location and order food/beverages
- Hold follow up meeting with management/planning team/sales teams to check attendee status and identify any potential issues in number of registrations, class logistics or food/beverage

- Develop and implement weekly call-a-thon to invite dealers from tiered target lists to class and drive registrations
- Ensure class preparation/status update is included in weekly meetings with sales/management teams
- Continue to hold weekly meetings with planning and sales teams to monitor registrations
 - Create action plan if registrations are slow
- Continue marketing/promotional tactics and call-a-thons to drive awareness/registration

2 Weeks Prior:

- Send 2-week class reminder email (with all class details included) to attendees
- Develop post-class contractor/TM implementation plan

1 Week Prior:

- Send 1-week class reminder email (with all class details included) to attendees
- Confirm classroom set up, food/beverage and any additional activities you may be holding during training (i.e. group dinner, recognition/awards, etc.)
- Confirm delivery of class materials with Honeywell Training Team

1 – 2 Days Prior

- Ensure classroom/materials are set up prior to meeting with Honeywell Sales Trainers
- If offering food/beverage, confirm delivery times, coolers, ice, utensils, etc.
- Hold introduction/content review and attendee overview meeting with Honeywell Sales Trainers.

Questions?

Contact the Honeywell Sales Excellence and Training team at trainingteam@honeywell.com.



Program Registration Form

1. Place check by the program you wish to register for below:

Program Name	Program ID	Program Cost
Residential S.T.E.P.S to Success – Distributor Hosted - 1 Session	005150	\$7,000
Residential S.T.E.P.S to Success – Distributor Hosted - 2 Sessions	005151	\$11,500
Residential S.T.E.P.S to Success – Direct to Contractor	005152	Call for pricing
Residential S.T.E.P.S to Success PLUS – Direct to Contractor	005153	Call for pricing
Velocity Business Development Program	005154	Call for pricing
Residential Accelerate Sales Training Workshop - 1 Session	005155	\$6,000
Residential Accelerate Sales Training Workshop - 2 Sessions	005156	\$10,000
Commercial S.T.E.P.S to Success – Distributor Hosted - 1 Session	005157	\$7,000
Commercial S.T.E.P.S to Success – Distributor Hosted - 2 Sessions	005158	\$11,500
Commercial S.T.E.P.S to Success – Direct to Contractor	005159	Call for pricing
Commercial S.T.E.P.S to Success PLUS – Direct to Contractor	005160	Call for pricing
Commercial Accelerate Sales Training Workshop - 1 Session	005161	\$6,000
Commercial Accelerate Sales Training Workshop - 2 Sessions	005162	\$10,000
SPARK! Presentation Skills Training Workshop – 1 Session	005163	\$6,000
SPARK! Presentation Skills Training Workshop – 2 Sessions	005164	\$10,000

2. Complete all fields:

Company Name: _____

Address: _____ City: _____ State: _____ Zip: _____

Contact Name: _____ Email: _____ Phone Number: _____

Requested Class Date(s): _____

Class Materials Shipping Address: _____ Check here if same as company location Address: _____
City: _____ State: _____ Zip: _____

3. Payment Information (check one)

_____ Distributor Market Development Funds (MDF) Account Number: _____

_____ Credit Card (Visa, MasterCard or American Express Only) – Call 1-800-332-7031 to process payment

4. Name of local Airport instructors should fly into _____

Date Change Request and Cancellation Policy
Class date change requests may be submitted in writing to trainingteam@honeywell.com up to 45 days prior to first class date without penalty. After 45 days, there will be a \$150 change fee assessed for any changes to class dates. It will be the responsibility of the Distributor to communicate all date and registration changes to class attendees. Date change subject to Trainer availability.

Refunds less a \$300.00 cancellation fee will be given for class cancellations received in writing to trainingteam@honeywell.com 30 days prior to the first class date. Following this date, no refunds will be given and distributor will be responsible for class cost and trainer travel costs. It will be the responsibility of the Distributor to process all class tuition refunds.

Sign: _____ Date: _____

For questions, please contact: trainingteam@honeywell.com or call 1-800-332-7031.

Please email completed form to: trainingteam@honeywell.com

Only completed forms will be accepted

Meet Your Dedicated Honeywell Sales Excellence Training Team

The Honeywell Sales Excellence and Training Team is a specialized and dedicated group of seasoned, successful and tenured Heating, Ventilation and Air-Conditioning (HVAC) sales professionals who focus on teaching contracting businesses how to maximize their long-term sales growth, differentiate themselves from the competition and most importantly, increase the value they bring to their current and future customers.



Joe Cappelletti, Sales Excellence and Training Director —

Joe leads the Sales Excellence and Training field team in delivering highly impactful sales training classes, workshops and business development initiatives that address and resolve an individual business's key issues, teaches impactful sales skills to their staff and partner to drive long term, organic growth and profitability. Joe's team provides unmatched, dedicated support and impactful, individualized training, growth and development for not only the ECC Honeywell Sales Organization, but also to highly motivated, committed HVAC contracting business owners and staff looking to ignite sales growth and long-term profitability. Since coming to Honeywell in 1978, Joe has held several successful sales roles such as President of ADI, ECC Regional Sales Leader, ECC Sales Director and most recently Sales Excellence and Training Director.



Jamie Quanrud, Sales Excellence Training Leader —

Jamie joined Honeywell in early 2013 and for over two years has implemented the Sales Excellence Training strategy across the Americas. She and the Sales Excellence team develop, implement and manage all Honeywell ECC internal and external sales training programs. Jamie spends a significant amount of time working with contractors and distributors to identify specific training needs and deliver customized training solutions to address key customer concerns. Jamie holds a Bachelor of Arts degree in Communication, and previously held roles in client management and client training at UnitedHealth Group.



Tausha Patterson, Sales Excellence Training Specialist —

Tausha has been with Honeywell since 2007 holding positions with Honeywell's WEBs and OEM sales team. Tausha has experience working with multi-location customers as the internal interface and liaison for the Honeywell sales team; responsible for supporting strategies, programs, and processes for Honeywell's OEM strategic accounts. As part of the Sales Excellence Training Team, Tausha works with different lines of business to identify and create new training opportunities that address key concerns or areas of improvement and collaborates with her team to provide impactful training classes for contractors and distributors that improve and grow their skills sets.

Learn More

For questions and to learn more, contact the Sales Excellence and Training Team at:

trainingteam@honeywell.com

or call toll-free at: **800-332-7031**

Automation and Control Solutions

In the U.S.:

Honeywell

1985 Douglas Drive North

Golden Valley, MN 55422-3992

In Canada:

Honeywell Limited

705 Montrichard

Saint-Jean-sur-Richelieu, Quebec

J2X 5K8

www.honeywell.com

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