



**Distributor Planning Packet
and Registration Form**

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 honeywelltraining@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 \$4,500 for one day class or \$8,000 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 Months 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 honeywelltraining@honeywell.com.



S.T.E.P.S to Success In-Field Sales Training Workshop

Distributor Registration Form. All Fields Required.

Distributor Host:

Hosting Distributor Name: _____

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

Company Phone Number: _____ Fax: _____

Company Contact Information

Planning contact will manage class preparation, contractor registration and payment.

The Sales Excellence team will contact this person three weeks prior to class to confirm final attendee numbers for in-class materials.

Planning Contact Name: _____

Email: _____ Phone: _____

Class Information

- Your tuition includes either a one day class (\$4,500) or two single day training sessions (\$8,000), with the option of holding the classes in the morning or afternoon/evening.
- Classes need to be consecutive days and are approximately 7 – 8 hours in length (including breaks and lunch/dinner)
- We recommend focusing one class for the service/install technicians and the other for the contractor sales staff and requiring distributor staff to attend one of the sessions.

Classroom walkthrough and attendee overview will be held prior to class.

Check here for : One Day Class Check here for : Two Single Day Classes

Requested Dates: _____ Times: _____

Alternate Requested Dates: _____ Times: _____

Class Location

Check here if same as distributor location entered above

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

Phone Number: _____ Fax: _____

Shipping Address for Class Materials (items shipped 1-2 weeks prior to class)

Same as distributor location Same as class location

Address (No P.O. Boxes): _____ City: _____ State: _____ Zip: _____

Attention to: _____

Payment Information (check one)

Distributor Market Development Funds (MDF) Account Number: _____

Credit Card: (Visa, MasterCard or American Express Only) – **Call 1-800-865-1553 to process your tuition**

Company Invoice: Place an order (*just like you would for product orders*) using the part number “STEPS” on your company P.O. _____

Note: standard billing rates apply.

Check Remit Payment to:

Honeywell Sales Excellence and Training Team

1985 Douglas Drive North, MN10-191A

Golden Valley, MN. 55422

Note: Checks must be received before class dates will be booked

Date Change Request

Class date change requests may be submitted in writing to honeywelltraining@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.

Cancellation Policy

Refunds less a \$150.00 cancellation fee will be given for class cancellations received in writing to honeywelltraining@honeywell.com 30 days prior to the first class date. Following this date, no refunds will be given, but a credit (less \$300) will be issued to use towards another S.T.E.P.S. training workshop within one year. It will be the responsibility of the Distributor to process all class tuition refunds.

Email this form to:

honeywelltraining@honeywell.com

Sign _____ Date _____

Only Completed Forms Will Be Accepted

You will be contacted within 5 business days with date confirmation and additional planning information and planning webcast date request.

Meet Your Dedicated Honeywell Sales Excellence and 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 that 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.

Katie Leifeld, Sales Excellence and Marketing Leader –



Katie joined Honeywell in 2005 and for the past two years has worked closely with the Sales Excellence team to develop and implement the Sales Excellence and Training strategy across the Americas. She leads a team of highly focused internal resources to develop, implement and manage all internal and external training programs and New Hire Employee Training Orientation. Katie and her team also spend

a significant amount of time in the field working closely with contractors and distributors to identify and create dynamic training programs that address key customer needs and ensure content delivery resonates with participants both during and after the training class. Katie holds a Bachelor of Arts degree in Advertising and Marketing from the University of Minnesota and previously held the role of Senior Trade Channel Specialist within Honeywell's ECC Residential Home Comfort and Energy Systems business. Additionally, she has held roles of both inside and outside sales as well as strategic account management with FedEx.

Learn More

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

35 Dynamic Drive

Toronto, Ontario M1V 4Z9

www.honeywell.com

Matt Adcock, In-Field Sales Excellence and Training Coach –



For the past six years, Matt has worked hand-in-hand with contractors in the Arizona and Las Vegas markets to help them increase profitability and drive long-term success through real-world sales and skills development trainings and workshops. Prior to Honeywell, Matt worked directly for a highly regarded HVAC contractor where he focused on everything from dispatch to service management and outside

sales. His contracting experience gives him a strong knowledge base in implementing flat rate pricing, building year-round maintenance programs and creating active accessory offerings. As a constant learner – and to better understand and serve the needs of his client base – he earned his MBA from the WP Carey School of Business with a focus on Entrepreneurship. As part of the Honeywell Sales Training team, Matt conducts sales and skills training on a nationwide level, as well as works hand in hand with individual contractor owners/staff looking to differentiate themselves in their markets and drive increased profits for their business.

Jenna Ball, Sales Excellence and Marketing Specialist –



Jenna has been with Honeywell for four years; prior to joining the Sales Excellence Training team in late 2011, she was a key member of the Residential Home Comfort and Energy Systems Trade Channel team leading initiatives such as the Homes University Customer training program, Market Development Funds (MDF) Management, website development and served as a key member of Honeywell's

new product introductions. Additionally, Jenna served as the Signature Account Specialist for a National Distributor Account as well as member of Honeywell's Customer Care team. Jenna received her degree in Marketing from University of Wisconsin-La Crosse in 2007.

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