SMARTCOOL™

Starting with Smartcool

A Guide To Achieving Success

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Welcome to Smartcool's Network

Congratulations! You are on your way to becoming an independent partner within Smartcool's international network of distributors and sales representatives. With two strong energy efficiency retrofit products behind us, and over 20 years of experience in the field, Smartcool provides unparalleled opportunities for its partners. High profit margins, substantial technical and sales support, and access to two proven, unique technologies: what more could a business ask for?

This guide is designed to help you get started on your new road to prosperity with Smartcool. Whether you are a non-exclusive ECO^{3}™ distributor, or entering into an exclusive ESM™ distributorship, we want to provide you with the tools you will need to succeed. Along the way, you will see checklists, tips and plenty of other information to help you target customers and sites effectively, prepare professional-quality proposals, order equipment from Smartcool, install and monitor equipment properly, and successfully close deals.

A great deal of our information is open to the public, and you can view it on our website at:

www.smartcool.net

For the rest of it, we will send it to you as you need it. Also, once you have a signed Agreement, you will be given acces to our secure online Smartcool Network where you can browse through libraries of support materials.

Smartcool also has a strong team of experienced staff who are ready to assist you with any road blocks you may encounter. If at any time you have any questions or concerns, please do not hesitate to contact your Smartcool Representative (this person is your main point of contact with us). We are here to help!

Initial Checklist

At this point, you should have the following key documents, which need to be signed and returned to Smartcool ASAP:

- ☐ Non-Disclosure Agreement
- ☐ Formal Agreement
- ☐ Smartcool Trademarking Agreement
- ☐ Smartcool Trademark Guidelines

The first three documents provide you and Smartcool with important legal protection. Without a legal framework in place, we cannot move forward effectively or establish a strong relationship. If you have not yet received these items, or wish to discuss them in more detail, please notify your Smartcool Rep. The Guidelines will help clarify how to write about Smartcool in your online or other public documents.

Technology Overview

By this point you will have undoubtedly gathered a fair bit of information on Smartcool's technology. However, in order to really achieve forward momentum, you will need to become very familiar with certain key aspects of our products. Customers will always have many questions that you must be prepared to answer correctly. The sections below provide you with a concise recap of compressor optimization, followed by summaries of the ECO³™ and ESM™.

Compressor Optimization

Smartcool technology makes air conditioning, heat pump and refrigeration compressors more energy efficient, through a technique known as compressor optimization. A compressor's capacity to provide the required temperature in a controlled space, is directly proportional to the system operating temperature. As the system temperature and suction pressure drops, so does the heat removing capacity of the system. Removing the last degree of heat requires double the energy required to remove the first degree of heat. Therefore, air conditioning, heat pump and refrigeration systems are most efficient immediately after the compressor starts.

Smartcool technology enables the compressor to maximize the rate of heat removal by optimizing the natural physical properties of the operating cycle. Smartcool causes the system to operate more often at a higher suction pressure where heat is removed more efficiently, thus requiring fewer operating hours and less electricity usage. A popular analogy to explain compressor optimization to customers without a technical background, is the 'Sand & Scoop' model below.

Sand & Scoop

Imagine a bucket that has 40 pounds of sand in it. The bucket represents your room or controlled space and the sand represents the amount of heat that needs to be removed from the room or controlled space by the refrigeration or AC system. If you had a scoop that could remove 10 pounds per minute from the bucket it would take 4 minutes to remove the sand.

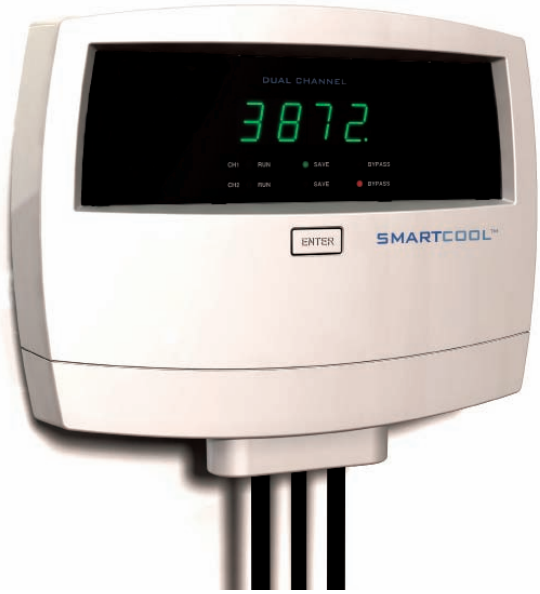
The compressor is represented by the scoop that is removing sand (heat) from the bucket (the room). A compressor is most efficient at heat removal when it first starts up and is operating at a high suction pressure. As the compressor continues to run, the suction pressure drops and it removes less heat per unit time and its efficiency is reduced. In our analogy the compressor is better represented by a variable capacity scoop that removes less sand per minute the longer you scoop. For example, it starts out scooping 10 pounds per minute and as time goes on it may reduce to 5 pounds per minute requiring more time than 4 minutes to remove all the sand.

If it was possible during the scooping process to increase the diminished capacity of the scoop upward you would now remove all the sand in less time than if you did not increase the scoop capacity. This is what Smartcool technology does for compressors. It increases the efficiency of the compressors by raising the suction pressure of the system so the compressor is able to remove more heat in less unit time. Since the compressor runs less it saves energy, and since it removes the same amount of heat in less time there is no effect on the average temperature of the room or controlled space.

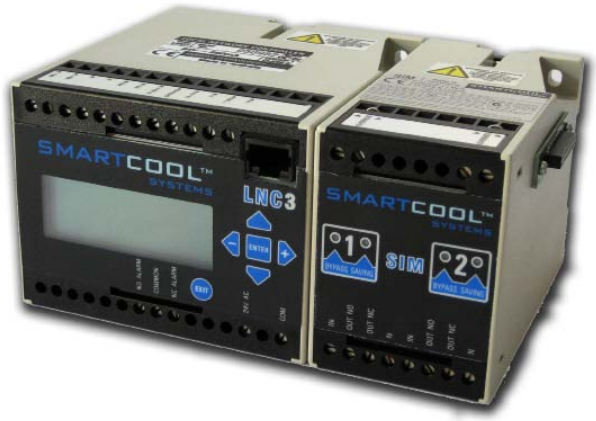
Smartcool offers two unique products for resale by its partners. The ECO³™ is the ideal 'starter' product, as it requires less technical expertise than the more advanced ESM™. Product specifications and other general product details are **available online**.

The ECO³™

Smartcool's newest energy efficiency retrofit can be installed on any air conditioning or refrigeration unit with one or two compressors, and will save an average of 15% of the energy used by that system. The most significant feature of the new ECO³™ is its ability to save energy on the cooling and heating cycles of compressor driven heat pumps, significantly increasing the opportunity for energy savings. With its IP64 enclosure rating and simple installation process, the ECO³™ can be installed quickly in virtually any location without additional and often costly protection from the elements. Once installed, the large display screen of the ECO³™ allows for easy monitoring of the amount of energy it is saving for the customer.



The ESM™



Smartcool's original Energy Saving Module™ is a highly technical product that can be applied to a multitude of different cooling systems. Like the ECO³™, the ESM™ will save an average 15% of the kWh used by compressors in air conditioning and refrigeration systems. Thanks to its modular design, the ESM™ can be custom-built to best suit each installation. The ESM™ is compatible with any type of compressor (reciprocating, scroll, screw and centrifugal), made by any manufacturer, and can work with any type of controller. In addition to its compatibility with virtually any system, with the exception of blast chillers, the ESM™ can be linked to a modem for remote performance monitoring.

KEY POINTS TO REMEMBER!

- Smartcool saves an average 15% kWh usage by the compressor (customers love this!)
- Smartcool saves an average 10% KW demand by the compressor (utilities really like this!)
- Smartcool technology has no negative effect on existing equipment or controls. In fact, it can extend the life of compressors and reduce their maintenance costs.
- Smartcool technology has no discernible effect on controlled space temperature or humidity.
- Smartcool offers a 1 year manufacturer's warranty on all its products.

Technology Information Checklist

Smartcool has the following items available to help you understand our technology, so you can better explain it to your customers:

- ☐ Compressor Optimization Explanation
- ☐ **Product Overview Presentation**
- ☐ **ECO³™ Product Sheet**
- ☐ **ESM™ Product Sheet**
- ☐ **Full Product Brochure**
- ☐ **Third Party Testing Summary & Reports**
- ☐ Compressor Manufacturer Warranty Approval Letters
- ☐ ECO³™ FAQs
- ☐ ESM™ FAQs

Do all the information you need? Click on the names in blue to view the items online, or ask your Smartcool Representative to send you copies (not all items are available online).

Targeting Customers

Once you are up to speed on the technical side of things, it is time to find your customers. The first thing to realize, is that not all customers are created equal when it comes to Smartcool technology. Although the ECO³™ and ESM™ can achieve energy savings on virtually any system, they can achieve these savings more economically on some systems than on others. Certain industries are better candidates for Smartcool technology, simply due to their inherent cooling requirements. Certain customer sites are better than others due to their operating requirements.

Knowing which industries, sites and equipment offer the greatest chance of meeting energy reduction targets and the client's return on investment needs, is a key step to completing the sales process. By following the steps outlined below, you can focus your efforts on customers where you are significantly more likely to meet with success.

1. Review your existing customer base

Depending on what your existing business involves, you may already have a strong customer base with which you can begin to work. As we progress through the different considerations for targeting customers, make sure you take a critical look at your existing customers to determine if they would be a good fit with Smartcool technology.

2. Target specific industries

Smartcool's extensive experience in the energy efficiency field, has revealed certain industries where our products are an excellent fit. Any industry where there is an above average level of energy consumption by cooling systems, is a great target for Smartcool technology. They are generally aware that their air conditioning or refrigeration systems cost them a huge amount of money annually, and are open to suggestions on reducing their operating costs. The 'Key Industries' box highlights the main industries on which Smartcool has focused.

Key Industries for Smartcool

- Supermarkets
- Telecommunications
- Data centers
- Cold storage
- Food processing
- Convenience stores
- Commercial real estate
- Hospitality
- Institutions

Less Ideal Industries for Smartcool:

- Residential

Although the vast majority of industries would benefit from Smartcool technology, some have operating conditions which make proving savings levels quite problematic. For example, in the 'Less Ideal' box here, we have identified the residential market as being a difficult industry for Smartcool technology.

In some areas with high ambient temperatures or high electricity rates, we have certainly been able to provide considerable savings in the residential sector. However in more temperate climates or in areas with very low electricity rates, the cooling systems and even heat pumps in homes do not consume enough energy to make Smartcool technology financially appealing to the customer.

3. Target specific sites

Now that you have focused on the industries where Smartcool can be most readily applied, it is very important that you take the time to choose strong installation sites. The strength of a site is determined not only by the technical specifications of the equipment there, but also by many details that you can uncover before even beginning your site survey. If you have a customer with many locations, for example a supermarket chain, some stores may be much better than others for a Smartcool installation. If your business operates in many different regions, again some may be better than others due to climate, electricity rates, or available utility and government financial incentives. In some cases you may not have a choice, but it is still important to know what to expect from sites you are preparing to work with. There are quite a few factors to consider, and the following questions should help you make the right decision every time.

Choosing the Right Site

What approximate electricity rate is the site paying for kWh and KW?
Higher usage and demand rates give you the opportunity to provide energy savings with a higher financial impact for the customer. In turn, this lets you provide an excellent return on investment even on quite small units. Very low electricity rates mean that you may need to focus on large scale equipment to get a favourable return on investment for the customer. You can usually get an estimate on electricity rates for a site by looking up the relevant utility online and checking their tariff schedule.

Is the site in a hot and humid climate, a temperate climate, or...?
Hotter climates evidently put more of a load on cooling systems, and will often have less variation in the run hours for the equipment. This is positive for a Smartcool project since it gives you the opportunity to provide consistent savings at almost any time of the year, which again accelerates the return on investment for your customer. Temperate climates can also be a good choice if you plan on targeting heat pump applications or refrigeration systems, but air conditioning systems in these cooler climates will often fail to offer enough run hours or enough load on the system to be economical for a Smartcool project.

Does the site have a great deal of heat generating equipment or large groups of people?
Certain industries have an inherent additional load because of the nature of their business. Sites like data centers where the server racks generate a huge amount of heat, putting considerable extra load on the air conditioning systems, are a great choice for the same reasons that sites in hotter climates work well. Facilities that see a large volume of traffic, such as shopping centers or schools, also have an additional load on the system simply from the heat generated by human bodies.

What are the operating hours of the site?
Many businesses only run their air conditioning when they are open. Therefore, for a company that operates 8 hours a day, 5 days a week, a Smartcool project is limited in the savings it can achieve because of the lower run hours of the air conditioning system. Choosing sites with extended operating hours gives you a better chance of meeting the client's return on investment expectations.

4. Target specific people

The final piece of the puzzle in choosing which customers you wish to focus on, is targeting the right people. Make sure you are communicating with both the financial and technical decision makers, since you need 'buy-in' from both sides before you will be able to move forward.

On the technical side, you may encounter engineers or facility managers with strong objections to a Smartcool installation at their site. Feel free to use all the material available on our website to demonstrate the reliability and effectiveness of Smartcool's products; case studies and independent third party testing reports are often enough to appease the naysayers.

Choosing the Right People

Does your customer have room in their capital budget for a Smartcool project?
Although Smartcool may have alternative financing options available for large customers with the potential for a roll-out, the vast majority of customers will need to purchase a project outright. Before spending a huge amount of time attempting to push through a deal where there is no capital budget available to fund it, make sure your customer is prepared to make a financial commitment.

What level of proof of savings will satisfy your customer?
In order to create an accurate proposal that will both cover your costs and satisfy the customer, you need to ascertain what you need to do to prove the product to the customer. Since Smartcool has a large body of evidence supporting its technology, some customers may be satisfied with just purchasing the product and trusting that it is saving them energy. However, most customers ask for a certain level of proof to reassure them. Smartcool has several different options for monitoring and verification procedures, and you need to determine which plan would best meet the needs of your customer. The more involved the M&V, the more the project will cost.

What expectation does your customer have for the return on investment from a Smartcool project?
It is crucial to get a sense of your customer's expectations and requirements prior to assembling a formal proposal. Although you may need to negotiate on pricing after an initial proposal is presented, it speeds up the process considerably if you know whether your customer requires a return on investment of 36 months, 60 months or 24 months. Some ROI requirements may simply be impossible to meet for some projects, and it is best to know this before spending all your time and effort on something that will not work financially for both you and the customer.

5. Targeting the right equipment

Alright. You have made it this far and have chosen the right industry and the right customer site, and you are even talking to the right people. Now it is time to perform your site survey, which is perhaps the most essential step in the entire process. We will go into this in great detail in the next chapter, but for now please review the checklist below to make sure you know which equipment will make or break a Smartcool project. Just like everything else, not all equipment is ideal for a Smartcool project, and identifying this at the beginning will save you a great deal of time and effort later on.

Choosing the Right Equipment Checklist

The following is a quick reference for checking the compatibility of equipment with Smartcool products, and judging whether a project has a good chance of success and whether you have the technical resources and products to complete it:

ECO³™ Suitable Equipment

- ☐ One or two stage air conditioning unit with scroll or reciprocating compressors
  or
- ☐ One or two stage heat pump unit with compressor driven heat, using scroll or reciprocating compressors
  or
- ☐ One stage refrigeration unit with scroll or reciprocating compressors
- ☐ In good condition with regular maintenance performed
- ☐ Properly sized for the load on the unit

ESM™ Suitable Equipment

- ☐ Any number of stages of air conditioning with any type of compressors
  or
- ☐ Any number of stages of refrigeration with any type of compressors
- ☐ NOT a blast chiller
- ☐ In good condition with regular maintenance performed
- ☐ Properly sized for the load on the unit

Getting the Green Light

The good news is that the hard part is over! Sales targeting is the step with the most variables to consider, and the rest of the project really does hinge on the targeting done at the beginning. Although projects that are not an ideal fit with Smartcool technology may very well be completed successfully, correct targeting makes the entire process significantly easier and quicker.

In this chapter, we will cover all the six steps leading up to getting the green light for a project. This process is very detail-oriented although quite straightforward, and it is important to follow each step carefully to avoid problems down the road. Smartcool has developed a large amount of material to help you through this pre-sale phase, and we are available to help you with any issues you may encounter. The end of the chapter will provide a summary of the materials you need to receive from Smartcool. Regardless of whether you are considering an ECO³™ or an ESM™ project, the steps are the same and equally important.

1. The Site Survey

You have gotten permission to move forward with a site survey at your customer's facility. Ideally, your Smartcool-trained technician will perform the survey, but if your technician is not available or if the facility is in a remote location, you can get the customer's technician to perform the survey instead. In either case, it is crucial that the person performing the site survey understands the importance of this step and is prepared to complete it properly. The Site Survey Form provided to you by Smartcool is quite self-explanatory, but there are a few key things to note.

PRE- Site Survey Checklist

Remember, every piece of information required by the Site Survey Form is essential, not optional, and failing to gather the correct information can have a significant impact on your ability to sell a project and on your profit margins. This checklist will help you make sure you have the best possible Site Survey, with absolutely all the necessary information.

Before going to the site, make sure you have the following things:

- ☐ Permission to be there and full access to the relevant equipment
- ☐ An on-site technician to answer any questions
- ☐ A printed copy of the Site Survey Form and extra paper
- ☐ A pen and clipboard
- ☐ A digital camera
- ☐ Sufficient time dedicated to complete a full site survey (up to 4 hours for a large site)

Once on site, the technician responsible for conducting the survey simply needs to follow the instructions on the Site Survey Form and to fill in every section on the Form. On the final page, the Form asks for any additional information that may have been gathered during the site survey. Any observations should be written down here, including but not limited to the following:

Obvious maintenance required.

There is no point in including broken or damaged units in a Smartcool project, as they will simply add to the cost without achieving savings for the customer. These units should be noted and excluded from the project unless the customer has an immediate plan to have them repaired.

Incorrectly sized units.

If a unit is severely undersized, it will be running non-stop and struggling or incapable of maintaining temperature requirements. A Smartcool project should not include these units since savings will be extremely limited and temperature is not being maintained. Oversized units are also inappropriate for a Smartcool project, since they will hardly run at all, making it impossible to achieve significant savings.

Access issues.

Some businesses may be very particular about who can access their equipment, and when this is possible. If this is known at the beginning, it makes the scheduling and installation much easier to plan correctly.

Controller information.

Smartcool is compatible with all known controllers, but the type of controller may impact the type of equipment to be used in a Smartcool project.

When the technician has completed the site survey, you are ready to progress to the next step. Make sure you have all the following pieces of the puzzle before you move on:

Site Survey Checklist

- ☐ Completed Site Survey Form
- ☐ Sketch of the facility
- ☐ Digital photos of the equipment, especially the name plates
- ☐ Confirmation of equipment run hours/days
- ☐ Contact information for on-site technician in case of follow-up questions
- ☐ Wiring diagram of the equipment, if available

2. The Installation Estimate

The technician completing the site survey should now be able to provide an estimate on the equipment and labour required for the Smartcool project. Smartcool provides a simple Installation Estimate Sheet in Microsoft Excel, where the technician can enter the quantity of Smartcool and peripheral equipment necessary to complete the project. The labour and material costs are calculated automatically to give you an overall estimate of the installation costs for the project.

Included on the Installation Estimate Form is room to identify the quantity of monitoring and verification equipment needed as well as the number of data retrievals and other M&V tasks required. The technician should be aware of the basic type of M&V planned for the project and therefore should be able to provide an estimate of necessary equipment.

3. The Sales Calculator

One of Smartcool's most valuable tools is the Sales Calculator. Using all the information gathered from the customer so far, your sales staff will be able to use the Calculator to establish an accurate estimate of the energy you can save the customer, the amount of money the customer will save, and how much the project will cost both you and the customer.

Although the Sales Calculator may at first appear intimidating, it actually requires virtually no experience with Microsoft Excel and is quite easy to use. There is a step-by-step instructional guide at the start of the Calculator, but we will include a brief orientation here to help you get acquainted with the tool. As with every other step, if you should encounter problems with the Calculator, Smartcool is here to help you.

Microsoft Excel uses 'workbooks' to organize information; a workbook can contain many 'sheets' that further divide information. For this tool, the Sales Calculator is one workbook, containing up to six sheets. The number of sheets in the Sales Calculator you receive will depend on your relationship to Smartcool. We try not to overload you with information that is not relevant to you, so some sheets may be taken out in your version.

The sheets in the Sales Calculator are accessible from the tabs along the bottom of the workbook, and can include: Instructions, Manual Adjustments, Main Project Analysis, Rebate Analysis, Summary of Results, Distributor Margins and Channel Margins. On the next page is a brief description of each sheet, so you will know where to go once you begin working with the Calculator.

Instructions
Evidently this is the best place to start! The Instructions sheet gives you a good breakdown of the steps you need to follow to complete the Calculator. It also provides a legend for the colouring used throughout the Calculator, so it is a very good idea to print out a copy for quick reference as you work.

Manual Adjustments
This sheet is only necessary if you have highly detailed information from the site showing that the automatic calculations on the Main Project Analysis are inaccurate for this case. You can alter certain key information on the Main Analysis, simply by typing it into the Manual sheet which will override the formulas on the Main Analysis sheet. To revert to the original formulas, all you have to do is delete your entries on the Manual sheet.

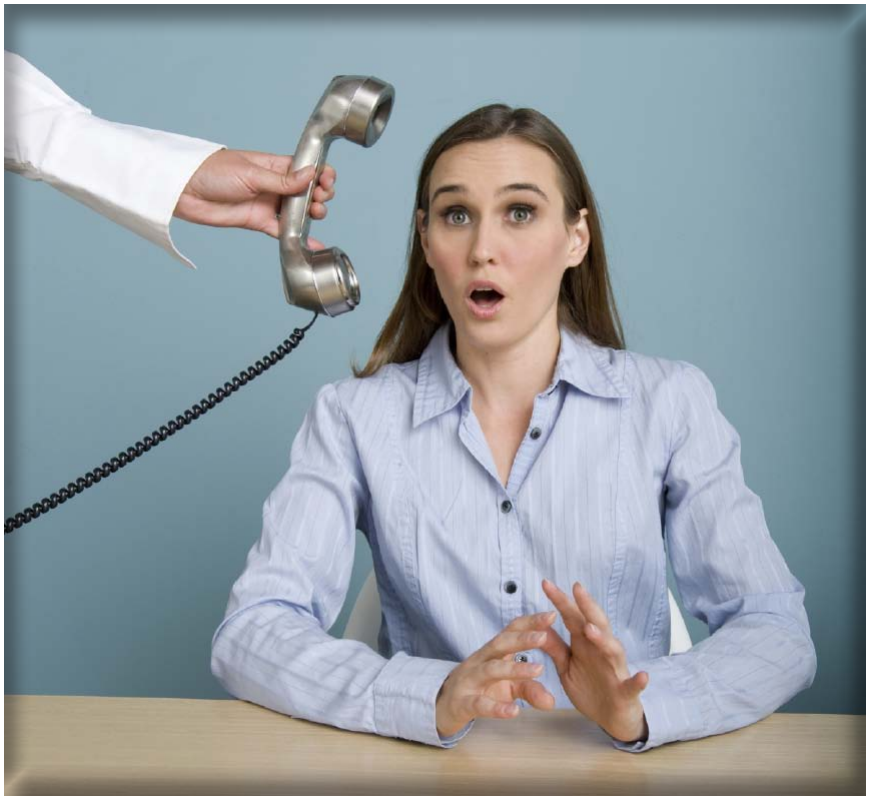
Main Project Analysis
This is the main place you will be working, and in some cases it may even be the only sheet you need. Starting at the top and working your way down, you will enter information from the Site Survey on all the equipment at the customer's site. This information will be used to automatically calculate the amount of energy and money a Smartcool project is likely to save for the customer. In the lower portion of the sheet, you will use the information from the Installation Estimate to enter the quantities of equipment, labour and M&V needed for the project. This will automatically generate a project price based on Smartcool MSRP rates.

When you have finished the Main Project Analysis sheet, you may be ready to move straight on to the preparation of the proposal, or you may need to do a bit more work on the other sheets. It is important to note that all the remaining sheets draw most of their information directly from the Main Project Analysis, so make sure you enter correct information and do not delete this sheet!

Rebate Analysis
Some projects may be eligible for rebates from the local utility or government. The customer may already know about an incentive program in place, but otherwise you should do a quick internet search to see what is available for the project. Most rebates in place today are calculated based on the estimated kWh and KW savings that can be achieved, so the Rebate Analysis sheet provides a simple way of inputting this data and automatically calculating the potential rebate.

Distributor Margins
For your internal use, this sheet will take information from the Main Project Analysis together with your own product pricing which you need to enter, and calculate your costs and margins for the project.

Channel Margins
If you are working through a third party you may need to provide room for their margins within the project. This sheet will do this automatically once you enter the product pricing to the channel.



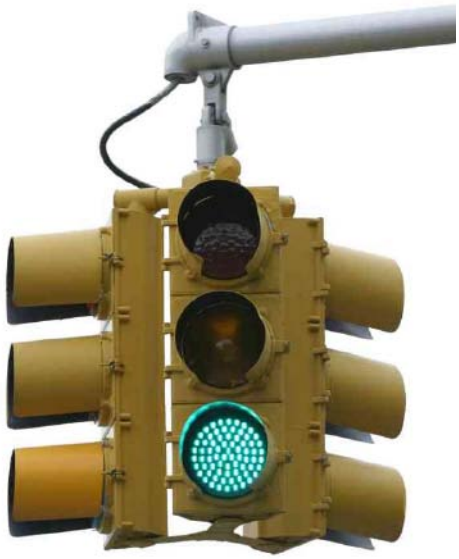
4. The Proposal

Correctly completing the Sales Calculator, together with solid communication with the customer, makes the preparation of the Proposal quite simple. Smartcool has samples or templates of different types of Proposals available for your reference. These can easily be co-branded to include your own logo and information, and customized to suit each project. Generally the sections we have in a Proposal to a client include:

Cover page with logos and date
Introduction
Summary of expected savings
Environmental benefits
Details on customer's equipment
Equipment to be installed in Smartcool project
Warranty
M&V plan (if necessary)
Payment terms
Commencement
Authorization sign-off
Appendix A: tables of savings per unit and environmental benefits
Appendix B: specifications on logging equipment (if M&V is necessary)

Without an initial M&V plan and Appendix B, which can range up to 7 pages in length, most proposals will fit into 5 pages plus the cover page. The goal of the Proposal is to present your quote in a professional, comprehensive manner, which gives the customer all the details they need to make a final decision without overwhelming them with details.

5. The Presentation



Often, you will not get the opportunity to formally present your Proposal to the customer, due to conflicting schedules, distance or other constraints. However, it can be very helpful to provide the customer with a soft copy of the Proposal by email and then follow up with a meeting within the same week. This gives your customer the chance to review the document and think of any questions they may have, and it gives you the chance to address and overcome any questions or hesitations while you still have momentum with the customer.

Smartcool has a variety of marketing materials which may be helpful in this type of meeting. Co-branding with your logo and contact details is possible for the majority of materials, and the Marketing Materials Overview presentation summarizes Smartcool's marketing policies. Smartcool also has a large database of case studies, which may also help during the presentation, as it allows customers to see actual results achieved at sites similar to theirs.

Checklist for Getting the Green Light

This chapter covered a lot of details, and reference quite a few materials Smartcool has prepared that may help you get the customer's approval for the project. Go through the checklist below to make sure you have everything you need from Smartcool:

- ☐ Site Survey Form
- ☐ Smartcool Sales Calculator
- ☐ Purchase Proposal Template
- ☐ M&V Plan Samples
- ☐ Marketing Materials Overview
- ☐ Case Studies

Gearing Up for the Project

The customer has signed your Proposal and you are going ahead with the Project. The next thing you need to do is generally not particularly exciting, but getting all your ducks in a row as far as equipment goes, is another essential step for the project. Smartcool has a strong process flow when working on projects directly, and over the next few pages we will share this with you to help you avoid some common problems and delays.

1. The Bill of Materials

Before you can assemble all the necessary equipment for the installation, you must know what you need! The technician who performed the Site Survey and/or Installation Estimate will also be able to advise on a Bill of Materials, since they are already familiar with the site and requirements. Your BoM should naturally include everything from Smartcool products to peripherals like wire and conduit, to any necessary M&V logging equipment. Once you have the BoM, you can ensure that you either have the correct quantities in your inventory, or you can order any outstanding items.

2. Smartcool Equipment

Smartcool can supply you with our products as well as any logging equipment from ACR, as we are an authorized dealer for them. It is important to keep in mind the fact that ordering Smartcool equipment will take time for us to process the order and have the equipment shipped to you, so please allow enough time between when you place the order and when you expect to install. Our average delivery time is under two weeks, but we cannot guarantee this due to potential customs delays, inventory shortfalls and other unforeseen circumstances.

To help speed up the process, it is essential that you provide Smartcool with a complete and accurate Purchase Order. Before we go into details on preparing a Purchase Order, we will cover some other key information you need to know.

First, you need to know the product pricing you have agreed upon with Smartcool. This information is included in a Schedule at the end of your Distribution Agreement.

CAUTION!

Always refer to your formal Distribution Agreement for definitive product pricing. It is your responsibility to include correct pricing on your Purchase Orders.

3. Preparing a Purchase Order

To make absolutely sure you know what we need to get from you on a Purchase Order, we have prepared a very detailed document to walk you through it, called the Purchase Order Process for Distributors. This document also includes a sample PO, in case you do not already have your own formatting in place. In brief, the process for a Purchase Order is as follows:

1. You prepare your Purchase Order, complete with shipping instructions.
2. Submit your Purchase Order to Smartcool. You can also wire the necessary prepayment at this time, to help speed up the process.
3. Smartcool issues a Pre-Payment Invoice.
4. You complete a wire transfer of any prepayment, and send confirmation to your Smartcool Representative.
5. Smartcool sends the Order to Ship to the warehouse, who then prepares the products for shipping.
6. Smartcool's warehouse ships the products, and confirmation is sent to you via your Smartcool Representative.
7. Smartcool issues an invoice for any outstanding balance.
8. You complete a wire transfer of any outstanding balance, and receive the shipment.

You may need to have certain information on Smartcool products to get a quote on shipping costs or to determine any special requirements by customs in your country. Smartcool has information sheets on shipping and customs details for the ECO³™ and ESM™, available from your Smartcool Representative.

Checklist for Gearing Up

Do you have these items from Smartcool?

- ☐ Full ECO³™ Pricing Structure
- ☐ Full ESM™ Pricing Structure
- ☐ Purchase Order Process for Distributors
- ☐ Smartcool Purchase Order Template
- ☐ ECO³™ Shipping & Customs Info
- ☐ ESM™ Shipping & Customs Info

Intelligent Installation

The installation portion of a Smartcool project should be very straightforward. Smartcool provides in-depth training manuals for the installation process, which any technician involved in the project needs to have. Smartcool can also arrange for on-site installation training, using one of your projects as a test case for training your technicians. With all this extra help available, here we will only mention some key points:

Schedule resources carefully.
Make sure your technicians are scheduled on site for enough to time let them complete the installation properly, and to run an initial system test to make sure everything is working correctly. Rushing your technicians through this phase will only lead to more time spent later when they have to return to the site to fix mistakes. When scheduling, remember to take into account any travel time and set up at the site that may slow down your technician.

Initial testing.
It is very important to run a brief On/Off test of the Smartcool equipment, ideally over a 2 day period, just to ensure that everything is properly installed and functioning as expected. You may find that some aspect of the installation was not ideal, and will have the opportunity to identify the problem and resolve it before telling the customer that the installation is complete.

M&V
An entire training manual is devoted to M&V, as it is a highly detailed process which needs to be implemented meticulously to succeed. Smartcool can also offer additional assistance with M&V processes, upon request.

User manuals.
Smartcool provides user manuals for the ECO³™, the ESM™ with SIM and the ESM™ with IIM. Make sure you leave the relevant manuals at the site for the customer's reference. It is important to wrap up the installation with a final visit between your technician and the on-site technician, to make sure the customer is comfortable with the project so far and is aware of the user manuals and other customer support available from Smartcool.

Checklist for an Intelligent Installation

Do you have these items from Smartcool? The items in blue are available online by clicking on the item name.

- ☐ ECO³™ Training Manuals
- ☐ ESM™ Training Manuals
- ☐ **ECO³™ User Manual**
- ☐ **ESM™ With SIM User Manual**
- ☐ **ESM™ With IIM User Manual**

Wrapping Up the Project

Once the installation has been completed, it can be tempting to get any final payment from the customer, close the deal and move on to the next one. However, Smartcool requests that you put in just a little bit more time with the customer before moving on. Particularly if there has been any M&V done on the project, your work is not quite finished yet. Some of the following steps are only directly relevant for projects with M&V, but you should consider implementing some equivalent step to really consolidate your relationship with the customer. It is worth spending the time at the end of a project to get the most value possible from your customer. Winning their confidence can often mean that you will have a good reference site for future customers, and will be able to build on this success.

1. Savings Report

If the project has involved any level of M&V, you will need to prepare a Savings Report for your customer. The complexity of the report depends on the complexity of the M&V, so some Savings Reports are bound to be much more involved than others. Smartcool has a good training manual to walk you through basic data analysis and the preparation of a Savings Report. Smartcool staff also has a huge amount of experience with the entire M&V process, and can help you make sure the process, analysis and report generation all goes smoothly.

Smartcool has a template that you are welcome to use for your Savings Reports, which includes the following basic sections:

Cover Page
Summary of Results
Summary of the M&V Process
Customer Equipment/Facility Details
Smartcool Equipment Details

Any of the following which may have been logged during the M&V:
Screen Results Analysis
kWh Savings Analysis
Internal Temperature Analysis
Ambient Temperature Analysis
Internal Humidity Analysis
Ambient Humidity Analysis
Conclusion

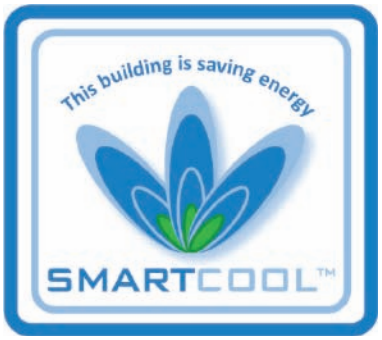
2. Savings Presentation

As with the Proposal, it is preferable to be able to formally present your Savings Report to the customer, rather than simply email it to them for review. Especially when there is more complex M&V and data analysis involved, the customer is sure to have questions which you will need to answer as soon as possible. Provided your M&V was conducted correctly, and you have presented the results in a clear manner, the Savings Report should really be only a formality to reassure the customer that they are getting what they paid for. Smartcool has a template for a Savings Results Presentation that you may wish to use when making a formal presentation to the customer.

3. Project Completion Fact Sheet

Whether there was M&V or not, it is very important that you keep a record of as many details as possible from the project. These details should also be shared with Smartcool so that as a Network we can all learn from each other's successes and problems. The results of a project are generally turned into case studies for internal reference, and particularly strong projects will have their case studies published on our website. Contributing a database of project results is to the benefit of everyone within Smartcool's Network of distributors, since it not only helps us learn from each other, but also provides great material for marketing, public relations and advertising efforts.

Smartcool has a simple Project Completion Fact Sheet you can use to send in your results, and you can also forward us your Savings Reports to contribute as many details as possible to the database. Please be assured that we will not share results or customer names unless you have given permission. Anonymous results are always an option, although they have proven to be rather unhelpful for external communications!



4. Smartcool Saves Campaign

This is a Smartcool initiative in the earliest stages of development, but we really hope that you and your customers will participate. In order to build greater brand and product recognition, we ask that customers place a Smartcool Saves decal in a visible location in their facility, similar to the way facilities have stickers demonstrating they have an AT&T alarm system or computer monitors show that they are Energy Star approved.

The pressure to become energy efficient is growing every day around the world and gaining significant popular attention. We feel that customers should be proud to have Smartcool products installed and saving them energy. Publicly acknowledging their investment in energy efficiency can benefit them greatly as they are seen as more environmentally responsible than their competitors. It will also benefit Smartcool and its distributors simply by giving more exposure and recognition to our technology.

The Smartcool Saves Campaign starts with a decal, but we hope that you and your customers will go beyond this. It is part of the job of your sales team to cultivate a strong relationship with your customers, so that they are willing to become references for future customers, and have their name and results publicized.

5. Roll Out

For customers with multiple locations, it is definitely worth pushing for more installations based on your positive results at the first site. This is something that should be brought up in early discussions to make sure you and your customer are on the same page. Once you have presented a Savings Report and ensured they are satisfied with the first installation, it is time to get serious about securing more sites. Logically, if the customer is happy with your work at one site, there is no reason they would not want to have you save them energy at all their sites. The only hurdle for these larger customers tends to be their own internal bureaucracy, which can slow down the process of expanding the project to other sites. Working through their internal requirements may take time, but it is generally worth it. Smartcool is available to help with these negotiations and with implementing the roll out which requires meticulous planning.

Checklist for Wrapping Up

Do you have these items from Smartcool?

- ☐ Savings Report Training Manual
- ☐ Savings Report Template
- ☐ Savings Results Presentation Template
- ☐ Project Completion Fact Sheet
- ☐ Smartcool Saves Decal

Welcome to the team and congratulations!

You now have the tools you need to build your business with Smartcool, and we look forward to working with you.

Key Contact Information

All communication with Smartcool should go through your Smartcool Representative, who will be able to best serve your needs and answer your questions. Fill in the information on your Representative here:

Your Smartcool Representative: _____

Location: _____

Office Number: _____

Mobile Number: _____

Email: _____

In addition to your designated Smartcool Representative, your regional Smartcool office will always be prepared to help you and supply you with any materials you may need:

Head Office: Smartcool Systems Inc.
Address: 1280 - 333 Seymour Street, Vancouver, B.C., V6B 5A6, Canada
Office Number: 604-669-1388
Email: info@smartcool.net
Website: **www.smartcool.net**

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Email: info@smartcoolusa.net
Website: **www.smartcoolusa.com**

European Office: Smartcool Systems EMEA Ltd.
(also serves the Middle East, Africa and the Indian Sub-Continent)
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Email: enquiries@smartcool.eu