

# Workforce Training for Clean-Tech Innovators



Thursday, January 29<sup>th</sup>, 2015  
1 pm – 5:30 pm

Friday, January 30<sup>th</sup>, 2015  
8 am – 12:30 pm

Portland Development Commission  
222 NW Fifth Avenue Portland, OR 97209

## Key Course Highlights and Benefits:

- Learn about the forces driving today's clean-tech sectors and the latest trends in technology, finance, and policy.
- Gather best practices and suggestions you need to successfully bring your clean-tech ideas to fruition.
- Hear panel discussions and network with top clean-tech CEOs and business leaders in the Northwest.
- Participants will bring brief summaries of their clean-tech ideas to the course and walk away with insights and strategic direction on turning their ideas into action.
- Five participating companies will be selected for one-on-one business development strategy sessions with Clean Edge principals.

Course is funded by a U.S. Department of Labor federal training grant in cooperation with Worksystems, Inc. Participants will need to provide additional information in advance and to present a government-issued I.D. at the course.

For more information, please visit <http://www.cleantech.com/training> or contact Bryce Yonker, Director of Business Development at [yonker@cleantech.com](mailto:yonker@cleantech.com) or 503.206.8448.



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## INSTRUCTORS

### Ron Pernick

Managing Director  
Clean Edge, Inc.



Ron Pernick is founder and managing director of clean-tech research and advisory firm Clean Edge and the coauthor of two books on clean-tech business and innovation, *Clean Tech Nation* (HarperCollins, 2012) and *The Clean Tech Revolution* (HarperCollins, 2007). At Clean Edge he has coauthored more than two dozen reports on clean technologies, markets, and policies and oversees the firm's research, event production, index publishing, and advisory services. He has taught MBA-level courses at Portland State University and New College, is widely quoted in the media, and is a regular speaker at industry events in the U.S. and abroad. He lives in Portland, Oregon with his wife and two children.

### Clint Wilder

Senior Editor  
Clean Edge, Inc.



Clint Wilder, senior editor, joined Clean Edge in 2002 and plays a leading role in the production of the firm's research and publications. He has co-authored two books, *Clean Tech Nation* (HarperCollins, 2012) and *The Clean Tech Revolution* (HarperCollins, 2007). Wilder has covered the high-tech and clean-tech industries as a business journalist for nearly three decades. A recognized expert on current trends in clean-energy technology, policy, and finance, Wilder is a frequent speaker and panelist at industry events in the U.S. and overseas. He is also a blogger for the Green section of The Huffington Post, and has been a facilitator in the Energy and Climate Change track of the Clinton Global Initiative and a founding member of the Clean Economy Network.



*Clean Edge, Inc., founded in 2000, is the world's first research and advisory firm devoted to the clean-tech sector. The firm delivers an unparalleled suite of clean-energy benchmarking services including stock indexes, utility and consumer surveys, and regional leadership tracking. Clean Edge provides companies, investors, NGOs, and governments with timely research, trending analysis, and actionable insights.*



*Worksystems is a 501(c)3 non-profit organization that pursues and invests resources to improve the quality of the workforce in the City of Portland, Multnomah and Washington Counties. They develop policies and design workforce development programs delivered through a network of local partners to help people get the skills, training, and education they need to go to work or to advance their careers. To learn more about Worksystems, please visit [www.worksystems.org](http://www.worksystems.org).*



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## GUEST PANELISTS

### Steve Jennings

*VP of Marketing*  
Qualitrol



Steve Jennings is VP of Marketing at Qualitrol, which provides smart electric utility asset condition based monitoring and transformer monitoring across the globe. He has global executive experience serving the electric utility, computer, communications and semiconductor industries. Prior to its acquisition by Qualitrol, Steve was a member of the management team that grew Serveron and BPL Global into a smart grid industry leader and Steve was most recently VP and General Manager of Serveron. He came to Serveron from Credence Systems where he was Director of Marketing. Prior to Credence, Steve spent eleven years with Tektronix in a variety of positions including National Sales Manager, Director of Marketing and General Manager. He also worked for Fluke, serving industrial and electric utility customers. Steve holds a Bachelor of Science Degree from the University of Connecticut and earned his MBA from the University of Oregon.

### Sam Pardue

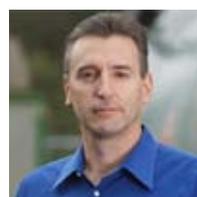
*Founder and CEO*  
Indow Windows



Sam Pardue is a serial entrepreneur who left the Intel mother ship to form start-up ventures in Portland, Oregon. After several years he left Intel to co-found Lensbaby ([www.lensbaby.com](http://www.lensbaby.com)), a celebrated Portland-based manufacturer of award-winning special effects SLR camera lenses. In August 2010 Sam stepped down as Lensbaby's CEO to found Indow Windows, a company that manufactures and markets Pardue's patented, award-winning invention, a window insert that presses inside window frames to deliver double pane window performance at a fraction of the cost. At the 2011 CleanTech Open, Indow Windows won the national Energy Efficiency Category Award, the national Sustainability Award, and came in second place for the Grand Prize. In addition, Indow Windows has received Environmental Leader Magazine's 2014 Product of the Year Award, Sustainable Business Magazine's Innovation in Sustainable Product Award, and a Bronze Medal from the Edison Awards.

### Chris Ulum

*President*  
Building Energy



Chris Ulum is President of Building Energy, an energy efficiency enterprise software company. Prior to that, he was a consultant and Entrepreneur in Residence at Oregon BEST. Prior to that, he served as the Chief Executive Officer of Agilyx Corporation for seven years, raising over \$73 million in financing, and growing the company to 65 employees and \$40 million in revenue and backlog. Before joining Agilyx, he worked for 10 years in the high tech industry for IBM and Sun Microsystems. His career includes leadership roles in diverse industries, including wood products, printing and packaging and food processing. Chris holds a Bachelor of Science degree in Business Administration from Oregon State University and an MBA degree from the Duke University Fuqua School of Business.



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## COURSE OUTLINE

**Sessions will consist of a four-hour training class plus breaks (total time 4.5 hours), in three parts:**

- I. A 90-minute PowerPoint lecture/presentation by Clean Edge principals Ron Pernick and Clint Wilder, including Q&A.  
  
[15-minute break]
- II. A 45-minute panel discussion, moderated by Clean Edge and including guest panelists Steve Jennings (VP of Marketing at Qualitrol), Sam Pardue (Founder and CEO of Indow Windows), and Chris Ulum (President of Building Energy).  
  
[15-minute break]
- III. A 90-minute interactive breakout session. For the first 45 minutes, participants will break into groups of 3 to address a specific marketing/business development idea or challenge (see “Coursework in Advance” section below). Each group member will give a one-minute elevator pitch on their clean-tech business idea, then the group will decide which one to tackle. Course instructors will move from group to group to listen in and provide guidance. In the second 45 minutes, each group will briefly present its conclusions, to be critiqued/discussed by the instructors and fellow participants.

### Questions to be answered:

- What are the prospects for the technology product/service? How viable is it?
- Is there enough market demand, or the ability to create it?
- Who are the best potential companies/other entities to partner with?
- What is the best financing strategy?
- What are the target markets?
- What is the go-to-market / marketing strategy?



## ADVANCE COURSEWORK ASSIGNMENTS

Please complete the following assignments in advance of taking the course.

### Outline/PPT Assignment (in Advance):

In order to maximize the impact and effectiveness of this exercise and the entire training, we ask each participant to bring to the course a 2-3 paragraph summary or 5-10 slide PPT deck outlining a major clean-tech goal/initiative/product launch that their company is working to achieve. This can be a product offering already in an advanced stage or simply a clean-tech offering that the company is considering.

### Reading Assignments (in Advance):

All participants should read the following materials in advance. Please use provided links to access content.

- [Clean Energy Trends 2014, Clean Edge](#) (online, required)  
[2014 Clean Tech Leadership Index](#) (50-page summary report online, required), Clean Edge (online)  
*Clean Tech Nation*, Ron Pernick and Clint Wilder:
  - Chapter 1: The Birth of Clean Tech (required) [click here to download chapter](#)
  - *Chapter 4: The Biggest Clean-Tech Developments Reshaping the World* (book, recommended – available on Amazon.com and other online booksellers)
- [“How clean tech, after notable failures, grew up in Oregon”](#) *Portland Business Journal*, July 4, 2014 (required)

## FOLLOW-UP PROJECT/ASSIGNMENT

**Take lessons learned and submit a 1-2-page brief or 7-12 PowerPoint slides on a specific go-to-market strategy** that the participant is looking to develop at his/her *company* (*information to be held in confidence by Clean Edge/Worksystems*). This assignment will be due two weeks following the completion of the course (Friday, Feb. 13). Clean Edge will review each submission and accordingly provide participants a certificate of course completion. Clean Edge and Worksystems will also select submissions from up to 5 companies to review and provide additional advisory support. Meeting with company leadership (via webinar sessions), senior Clean Edge staff will provide expert feedback and insights on each of these selected firm's development plans and market opportunities.

