

THE CHANGE LEADER, INC. - RESEARCH SERVICES - PROJECT REFERENCE

Reference organization's current and, if applicable, previous name and purpose	Schneider Electric
Reference organization's current address; phone number and fax number	247 Edelen Ave, Los Gatos, CA 95030
Reference contact person's name, title, phone number and fax number.	Mike Calise, Director, Electric Vehicle Business - Power North America Ph: 408-596-1262 Fax: N/A
Project Summary Narrative	
The type of services (i.e. grant writing or business evaluation, etc)	GMA was retained by Schneider Electric in October of 2011 to perform research services pertaining to electric vehicles. The client's request included both current news and information about industry trends as well as funding opportunities (both grant and procurement).
The desired outcomes of the project and how those outcomes were met by Offeror	GMA assigned a Senior Research Associate (PJ Shepard) to Schneider under the supervision of Kristin Cooper Carter. The Research Associate signed up to multiple news sources and created multiple alerts for relevant news topics in the industry and business news which provided a regular stream of information in for evaluation. The Research Associate signed up for notifications from multiple relevant funding agencies. The Research Associate reviewed all incoming notifications for relevance and also actively reviews relevant agency websites for opportunities not notified via email. Where relevant information was discovered, the Associate dug deeper for additional relevant details such as companies, names, funding amounts, eligibility requirements, due dates for applications and other important details. The Research Associate forwarded all relevant notification, opportunities and details obtained to the Client's distribution list.
The start and end dates of the project	
List the number of staff and levels of staffing that were used for the project	
A brief description of any delays or issues and their resolution if needed	The Client opted to pursue a grant opportunity that arose from this research about 2 years ago, and also utilized GMA to prepare the application, which was successful and received two awards for \$140,000 and \$45,500 in March of 2013. GMA then assisted Schneider in the fiscal management of these contracts.
The amount of revenue generated (if applicable)	These are ongoing assignments with this Client. Because the Client has been pleased with the services provided thus far, the scope of the research for this Client has recently been expanded from primarily the West Coast to all of the United States and also expanded from strictly research services to also Liaison with State Agencies, Grant Development and Procurement Services. A Senior Associate consultant has been added to the team to provide these additional services.