

# SOLGEN SOLAR HANDBOOK

## Welcome to SOLGEN

Congratulations on becoming an Advisor at Solgen! Here you will find a Blueprint of Success to ensure your effective launch in your new chapter. Please take the time to fully understand each function of your job and how you can utilize all the stakeholders. You will maximize your effectiveness by including all the following content into your daily workflow. All Energy Consultants of Solgen are authorized to sell the various products offered by those brands in their specific state or region. As Solgen personnel, we not only represent Solgen. We must maintain professionalism and integrity at all times with customers, vendors, and others we interact with. Our main lead financier is Sunnova.

**Sunnova's** goal is to be the source of clean, affordable and reliable energy, with a simple **mission:** to power energy independence so that homeowners have the freedom to live life uninterrupted

In collaboration with their certified partner networks, Sunnova offers "solar as a service," a seamless process which helps homeowners get solar energy that is perfect for their home and lifestyle.

1. Together, we assess the best solar solution that meets a homeowner's energy goals.
2. Experienced installers design and install a solar system customized for their roof, and personalized for the individual customer needs.
3. The homeowner simply pays a low, locked-in rate for their power, typically saving over 55% on their electric bill.
4. Sunnova finances, insures, and maintains the system for the life of the relationship.

Sunnova has a history of blending innovation with expertise, and brings over 20 years of experience in designing and maintaining high quality solar systems—making clean solar energy affordable, mainstream, and accessible for everyone in the U.S. Sunnova sells directly to consumers over the phone, web, and through a network of certified partners like Solgen. Sunnova has a wide base of customers across the country and is growing quickly. Customer satisfaction scores are on par with Apple, Amazon, Zappos, and Southwest Airlines.

# The Role of Solgen Energy Advisors

The role of a Solgen Energy Consultant is a multi-faceted one. You will be given many responsibilities and stewardships, but most of all, you'll be the most trusted source for solar in the industry. Your level of commitment, personal drive, and attention to detail is critical for your professional growth. We are here to support you in your new venture, and optimize your success.

## Sales Support Representatives

You have many resources available to you. You also have your very own **Sales Support** that will guide you through these next steps. They are your best point of contact for all questions and answers, including the following:

**Onboarding:** assist any new sales representatives in navigating the SOLGEN onboarding process.

**Commissions:** provide basic answers on any commission-based questions.

**Deal Progression:** assist you in gathering information on your accounts and help progress both pre and post signed stages of all accounts

## Materials

Over the coming couple of weeks and after you have been invited, onboarded, and completed the initial training modules, you will be given:

- SOLGEN polos
- business cards
- sales collateral
- ID Badge and lanyard pens, hat
- the Power Planner
- access to knocking tools
- access to SOLGEN Training and Competition Platform (“T

# PART 1

## Pre-Sale

### Bootcamp

Bootcamp classroom style training meeting held for any rep newly hired. The content ranges from Solar 101 to how to manage your day and how to sell solar direct to home. You can find the .keynote file to present with from the Link below.

Know where and when Bootcamp is

Ensure all Boot Camp prerequisites are complete (ask DM)

Participate and be all-in

You may receive at your local bootcamp

- Shirts
- Lanyard
- Pens
- ID Badge
- HIC Licensing, etc
- Hat
- Customer collateral
- SOLGEN Planner

Best Practices: Bring 4 Utility Bills, Journal, Pen, iPad or Laptop

### Policies and Procedures

As a member of the Direct Sales team and reports directly to the Manager (“DM”). Listed below are some of the policies and procedures that pertain to the position.

**Commission-Based Sales** Although you will not be required to punch a time clock, it is recommended you track and monitor your interactions and hours on daily basis. When hired, you are given an ideal schedule to work each week from your DM. Working more than those set hours is always welcomed as it will most definitely add to your bottom line. The most exciting part about 9 commission-based sales is that you control your earning potential. The sky’s the limit.

### Where to Work

Where you will work will be extremely flexible, however, you will need to work in the designated areas approved by your DM. You set your hours but will be given guidelines of industriousness as this is part of the culture at SOLGEN. You’ll be qualifying homeowners for solar by setting appointments both from people you already know and from people you meet going door-to-door.

You will be asked to participate in weekly team meetings and trainings designed to help you improve personally and professionally; typically those locations are designated and will be where you will meet several times per week. Your schedule is what you make of it. You will be the one to fill it up with appointments and presentations -- primarily at customers' homes. There will be a need to travel to and conduct sales meetings within customers' homes, so plan ahead and account for what-ifs and traffic.

## Requesting Time Off

Since you are an independent contractor, requesting time off isn't a requirement. However, it is important for you to let your DM know your schedule a few weeks ahead of time as he or she is in charge of reporting sales forecasts to their direct leaders. Stay in close communication with your DM, as he or she will help you manage your time in regards to vacations and emergencies.

## GroupMe

Upon hiring, the DM will add you to their office's online chat feed called GroupMe. It is recommended that you download the GroupMe app to your mobile device. GroupMe is a crucial part of your personal achievement as it is used for announcements, questions, and any other updates for the team. Be active on the GroupMe feed. This will be important for you as you surround yourself with other ambitious team members and will be critical for your development and success. Going about this job solo is the wrong way to think; rely on the other team members' success and support because they can relate to what you are experiencing. No question is a dumb one. Soak up the culture and support from other leaders in GroupMe.

## New Rep Progression

"A mentor program is designed to assist new reps in getting their first deals by assigning them to an experienced Mentor. We've found that by following this program, new rep production doubles."

Upon hiring, you will be asked to first learn how to set solid appointments. There will be trainings and people designated to coach you through all things as you begin your career at SLGN. These crutches will give you exactly what you need to learn the craft. The best practice is to mimic and duplicate exactly what the highly successful do and how they do it. You'll eventually start to feel a rhythm to the job and can start adding your own personality to it. For now, keep it simple and watch and learn. This is one of the most unique jobs on the planet, so keep your attitude positive, smile and have a good time, and work your tail off. Early on, lean on your small successes as those will build and lead to larger successes that will come with greater sense of accomplishment and greater compensation. The money will follow the value and skill sets.

## Commission Split

Junior Energy Consultants' pay is made up of what we call a Commission Split. This split is a shared commission to go both to the Senior Energy Consultant, whose responsibility it is to close the deal and make sure the deal gets installed, and the Junior Energy Consultant, whose responsibility it is to set solid appointments and learn the process of the Senior EC.

To Become a Senior EC, you must achieve 10 personal Approved Deals, and show leadership qualities

PAY: Senior EC gets credit for the sale on the Grid for Jr. EC's for any Split deals.

Senior EC and Junior EC earns split commission on installs shared between the two.

Junior EC works all hours with the Senior EC for the first 5-6 Days or until the Junior EC can be independently capable to set appointments.

Junior EC brings journal and pen, recorder and take lots of notes

Junior EC brings laptop or iPad to appointments

Junior EC takes good street sheet notes and track all leads in Planner and Interactions in Canvass

## Representative Licensing

Solgen requires that all Energy Consultants be licensed to go door-to door in the states they will be working in.

**State Level:** Sales Support will assist in obtaining the proper state level licensing, and will cover all costs associated for representatives.

For representatives in California, an HIS License is required. This license will be submitted and paid for by Solgen Power. The Sales Support will use the information from the representative's profile on the Panel to fill out this form.

**City Level:** Solgen will cover up to \$200 per year per EC to obtain necessary city level licensing. Above and beyond that allotted amount, representatives will need special approval. ECs will need to provide a case for the cost of the license (i.e. experience, # of sales). If approved, SOLGEN will cover the cost. If denied, SOLGEN will cover the \$200 allotment, and the rest will need to be covered by the EC.

## Self Management

## Area Management

Area Management is the way by which you will be able to remember and store useful information when prospecting. While working in your area it's important to understand trends and gather information. You can gain insight from the people you talk to. This information will allow you to understand,

- 1) how long neighbors have lived in the neighborhood, and
- 2) who has a lot of people living at their house (sign of a high bill).

You can also refer to Google Maps to identify homes with pools and optimal roof planes. Look for **signs of life** when individuals are home and go to those homes first. Use the Canvass app to help track interactions. Knock around the blue trucks!

## Time Management

Before you begin knocking, have a predetermined plan on where you will knock, how long you will knock, and what you will require of yourself. Determine what will happen when you face rejection and how you will react to it when it happens. Have your planner/knocking tool ready to record interactions. It's best to outline a performance schedule by compartmentalizing your day into sections. Break up your day into 4 parts:

Early Hours, Mid-Day, Evening, After Hours.

Set your goals for each part of the day. Know your number of interactions to obtain a sale to determine how many hours you will require of yourself. Work with your Mentor for understanding sales funnel ratios in your area.

## Communication

Communication is vital to your success! Everything from how you stand, to the tone and volume of your voice, sends a message (good or bad) to the customer. Communication must be not only studied and practiced, but you must "learn to teach yourself"! You will always fall back into bad habits if you don't brief yourself constantly and practice. Think about how to apply and practice these skills on a daily basis. Learn from your mistakes and constantly push yourself to improve day to day. As you apply these skills and "learn to teach yourself" you will have an awesome experience.

Every year our top reps have 2 things in common:

1. Great work ethic and attitude. They consistently work longer and smarter than any other EC
2. Effective communication skills. They can both listen and communicate with everyone and look happy doing it

**Total communication** is filtered through three parts:

- Non-verbal communication (Body language)
- Vocal communication (How you say the things you say)
- Verbal communication (The words you say) Each of these three parts carries a different weight and understanding.

Non-verbal communication is the largest of the three and represents 55% of the total communication process. Vocal communication is next with 38%, 3 Access to Communication Handout and Verbal communication represents only 7% of the total communication process. The significance of this is to understand that 93% of everything you communicate is filtered through everything except the words you say.

**Distance** impacts relationships greatly. You will want to be cognizant of this so you can be more influential to those you speak with. There are different Spatial Communication Zones that make up all communication distances:

The Intimate Space: <1.5 ft,  
the Personal Space: 1.5-4 ft,  
the Social Space: 4-12 ft,  
and the Public Space: >12 ft

## Non Verbal Communication

**Positioning:** Where and how you position yourself is also an important part of a door approach. Make sure you angle your body where you are not standing square to your customer, like a soldier would. This is a confrontational position. Instead, turn your body to the side and put one foot behind the other and relax. Using this position will make it easier for you to point to other homes that are getting the product from you. Also stand to the side where the customer can easily see your logo on your shirt. This will establish more credibility. After your initial door approach in this position, feel free to move around. Face the open space of the entryway, not the wall.

**Eye Contact:** In your initial door approach make your eye contact deliberate, but also brief. No more than three to four seconds. More than four seconds can give your customer a negative

impression of you. Use your eyes to communicate to the customer that you are honest and straightforward.

**Mirroring:** Mirroring is reflecting the actions of your customer, which means copying your customer's posture. For example if your customer leans back in his chair so should you. By mirroring your customers' body language, you increase empathy. If used correctly, it is one of the most effective ways of winning your customers confidence in you. Another example of mirroring is to nod your head while asking your customer a question that you want them to agree on. What will happen? Subconsciously, they will start to nod their head as well. You'll be amazed to see what they do.

**Other Helpful Tips:** When you want to get closer to the customer, show a visual aid to the customer. This will get the customer's attention and build his or her trust in you. Also if your customer has his or her arms folded, it means their mind is closed to what you are saying (asking). To overcome this obstacle give them something they can hold, like a slick, to get arms unfolded. This will unfold their mind as well. Use a click-pen to help regain the customer's attention when they get distracted.

**Things to Avoid:** Take off your jewelry. Be clean. Shave. Don't chew gum or wear sunglasses. Act your part. Also avoid any nervous movements such as shifty eyes, shuffling your feet around, talking loudly, and being timid.

## **Vocal Communication (The way you say the words)**

The second portion of communication is Vocal Communication. Vocal Communication relates to how you say and use your words. The inflection at the end of your sentences, tone of your voice, the volume, (loudness or softness,) speed or how quickly or slowly you talk, and pitch of your voice make up vocal communication. The vocabulary you use and your ability to tune in to your customers' vocal communication are important.

**Volume:** Most salespeople are loud. This will scare away customers. Someone who is confident in his or her message has no need to speak loudly. When talking to a customer, talk softly. We call it conversational confidence. This will make your customer listen to you. They will start to pay attention to you, and you will be able to control the conversation, showing the customer that they can have confidence in your message.

**Speed:** Usually new ECs and sometimes even experienced ECs will talk too fast in the initial door approach. We call it the show-up and throw-up routine. They feel that the customer wants all the information they have, all at once. Doing this will be sure to lose customers' attention. If you talk too fast the customer will think you are just another salesman coming to their door. Remember: someone who has confidence in his or her message has no need in talking loud or fast. Your pace should be that of a regular lowkey conversation. This will give you more

credibility in your customer's eyes. Sometimes when reps get nervous, they will start speaking faster. Avoid this at all times. Concentrate on speaking softer and slowing down when you speak.

**Voice Inflection:** The first words out of your mouth will create an image of you in the mind of your customer. By altering the pitch of your voice, you can say the same thing in many different ways. In door-to-door sales, you need to use the pitch of your voice to communicate confidence in your message. Never end a sentence on a high note. This subconsciously will create a lack of confidence for the customer because they feel that what you are saying is a question when in reality it should be a statement of truth. End your sentence on a low note. Like a doctor, you want to sound credible when you say your words and ask questions as a sentence:

Doctor-Does it hurt here? Practice saying this as a question.

Doctor-Does it hurt here. Practice saying this as a sentence.

### **Ownership Language:**

Speak in the future tense as though they already have the system. "YOUR options will be available in the next day," or "Our site auditor will check to see if your roof qualifies for YOUR system on Thursday." "YOUR online portal will show you...." YOUR, YOUR, YOUR.

### **Tuning In:**

Tune in to your customers communication channel. This means, if your customer comes to the door and speaks in a whispering voice, you need to whisper right back to them. If the customer comes to the door with a loud voice, be loud back to them (unless they are speaking through a door, then you'll want to be quiet to beckon them to come outside and listen). This technique will do wonders for you in other aspects of relationships.

## **Verbal Communication**

The last part of the communication process is VerbalCommunication. VerbalCommunication includes the literal words and meaning of the words you will use. Proper VerbalCommunication comes from an understanding of the product or service you are selling. You will become a polished wordsmith in the solar industry over time. Have your script ready at all times to practice and repeat. Avoid filler words such as “umm” and “uhh”. Natural conversations allow for pauses of silence.

## Culture

We believe the culture of Solgen is either created by design or by default by the sum of individuals and team. It is the difference between a good team and a great team.

“It’s the way we do things around here”

Culture is the sum of **who we are** and **how we treat each other**. We encourage you to buy-in to the atmosphere that you will see. That buy-in will have a direct impact on other individuals and create a greater passion and level of success while you are here. Be a team member that adds value and encourages and lifts others by practicing the below six Leadership Principles. Reach out to your Mentor to know the hand gestures behind each of these principles.

## Six Key Leadership Principles

1. **Play full out.** When you’re working, work. When you’re with family and friends, be with family and friends. Multi-tasking will cause distractions and decrease your level of effectiveness. Enjoy what you’re doing and have fun. There are many different roles in life. When balancing all these roles, be sure to focus your attention on that role and activity.
2. **Respect Different Perspectives.** Seek to understand before you are understood.
3. **Truly Listen.** Physically stop, look, then listen with both your eyes and ears.
4. **Put Your Butt on the Line.** You have to stretch and become uncomfortable or else there is no growth; there is no improvement. Your skill sets will either grow or diminish. There once was a runner who thought that instead of beating slower people than him every time, it’d be better to lose every time to faster runners as long as those

faster runners caused him as an individual to run faster at every race. Which race would you prefer to run?

5. **Trust Yourself; Trust others.** Trusting in yourself to do anything requires faith and skill (which bears the fruit of confidence). We must also trust others. We must assume positive intent and motive when 4 Access to Culture .key 17 communicating with others. Trust is the foundation of long-term relationships, which is the root of our culture.

6. **Be a Day Maker.** Think of someone that you enjoy being around because they make you feel better and doesn't tear you down. A day maker is someone that you genuinely enjoy being around and that brightens everyone's day around them. Take an inventory of yourself. Do you suck the energy away from people? Are you negative? How is your attitude when negative events occur? Are you looking for ways to learn from them and extracting a seed of equally positive importance that you can plant? Complain up—If you really have something to talk about DO NOT bring it your peers, bring it to the DM. Ideally, when bad things do occur, he or she can help you in seeing the vision or the solution where you are unable. Be an agent for change through solution-based reasoning rather than whining or complaining. What is the difference between driving your BMW or SUV?

BMW (Bitch, Moan, Whine)

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SUV (Serve, Unify, Vision)

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## Tools and Technology

You will be given a set of Tools and Technology resources that is specifically geared to your success here at Solgen.

Solgenclub.co

This is the software Solgen uses to both create, sign and manage accounts. It will be the most important tool for you to complete a sale and use Odoo to manage your accounts.

## Solgen Email

You will get your own email domain. Be sure to use this email as the approved email program for your company and customer interactions. Ask your Sales Support to help you get the mail app on your phone/devices. These email addresses will be set up by your Sales Support and they can assist you with password resets.

## Apps

You will need access to a CANVASS the knocking app, GROUPME the messaging app. Ask your DM for information on each.

## Commission Payments

Since pay will work differently for each market, refer to your manager in the individual market in which you work. You will be paid according to the latest terms made available to you upon joining.

## Timing

Work Week = Monday- Sunday Commissions are paid each Wednesday (10 days from the end of the work week which is Sunday).

Commission Reports are available each Friday by EOD

## Upfront \$

Engineering: CAP (Customer Approved Project) or Final Design is the first milestone when payment happens.

## Install \$

Every customer that has panels installed and is the total commission less

- Upfront payments already paid, and
- Backend payments not yet paid.

## Product Knowledge

### Definitions

**Solar Panels:** Photovoltaic panels that absorb the sun's rays as a source of variable direct current (DC).

**Inverter:** Converts variable DC into utility frequency alternating current (AC) that can be fed into the electrical grid and used by the homeowner.

**Meter:** Tracks total electricity consumption of home (consumption less generation of solar panels)

**Main Electrical Service Panel:** Connects electricity produced by solar and the utility to connect to the home.

## Solar Products

TPO (PPA/Lease)

TPO stands for third party ownership. Typically Sunnova owns the solar system that is put on the customer's roof and the customer in turn pays for what power is produced. In other words, the customer buys energy produced by the system.

**Annual Increase:** Customer is given a price per kW produced by the installed solar system which will increase 1.9% - 2.9% (refer to your market).

**Flat Rate:** Customer is given a price per kW produced by the installed solar system. Price never increases.

**Pre-Paid:** Allows customer to pay for all the power produced for all 20 years upfront at a discounted rate.

## Ownership

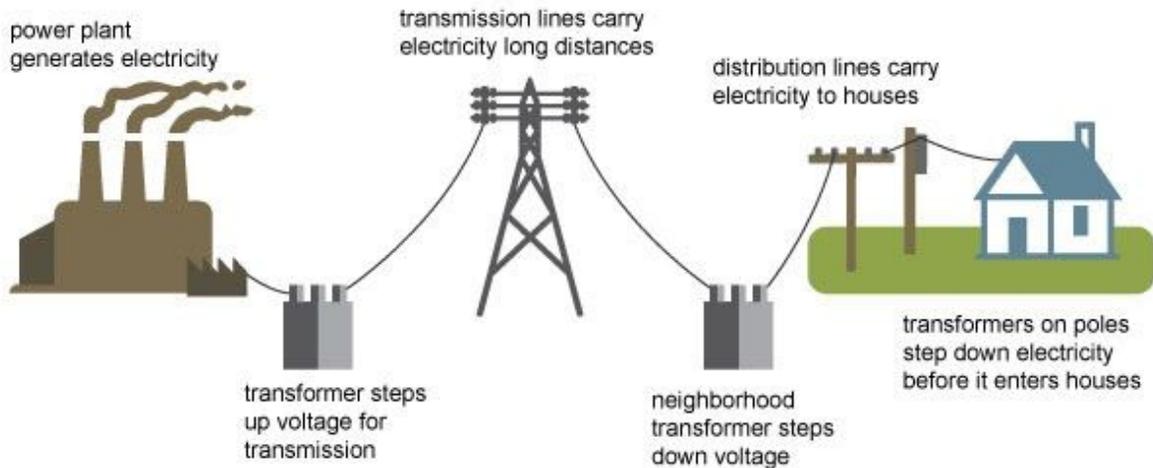
When the customer pays for the system all upfront or finances it over time. The customer earns the Investment Tax Credit.

You will help the customer arrange financing through one of our finance partners if the customer prefers to do more of a bill swap than paying cash.

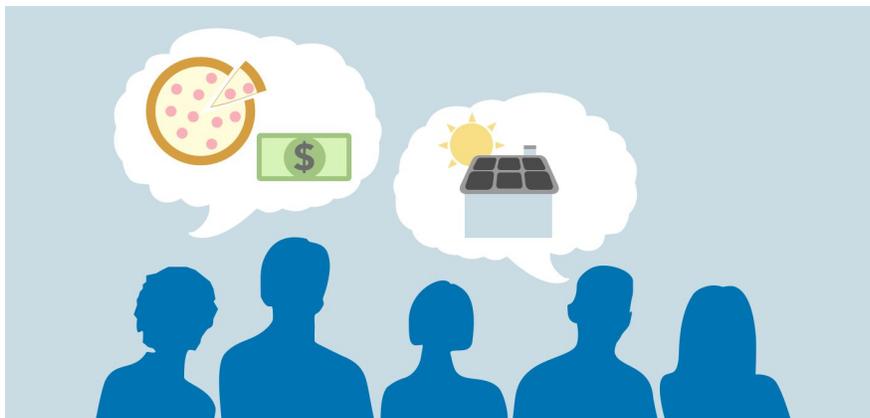
## Utility Knowledge

Graphics describing the function, limitation, and inherent weaknesses of a traditional power companies are below.

# Electricity generation, transmission, and distribution



Source: Adapted from National Energy Education Development Project (public domain)

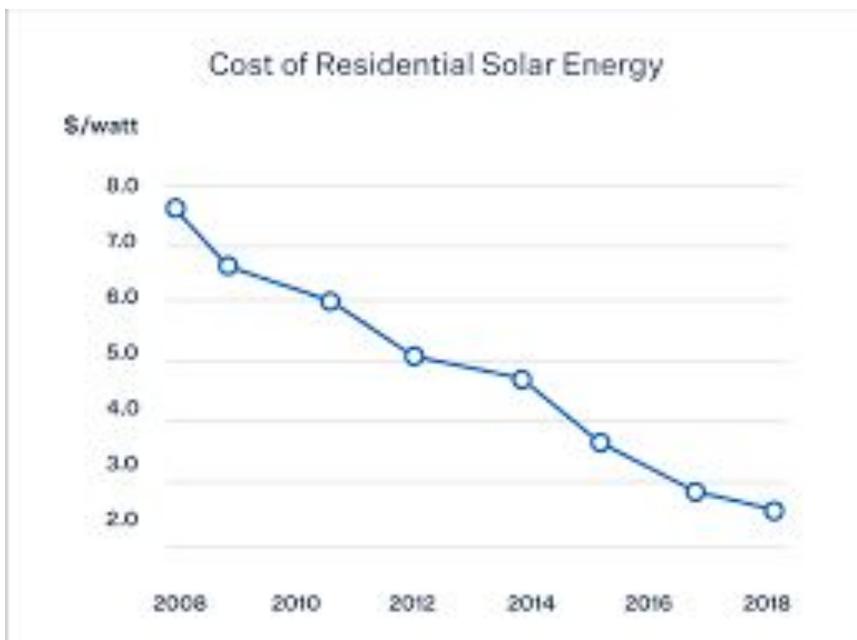


Pizza Delivery Charge Analogy:

Paying for Generation, Distribution AND Transmission!

Just like your local pizza joint, the utility charges for the product (generation) and delivery (distribution)

They even tack on a charge for Transmission (adding pepperoni)...



SOLUTION:

[www.sunrun.com](http://www.sunrun.com)

Courtesy of Sunrun, This graph shows the dropping price per Watt. It truly has never been a better time to buy Solar equipment.

# Approach

## How to Qualify a Roof

### Practicalities of Solar

“Which sides of the house face south, west, east or anything inbetween?”

South = Best roof plane = full sun

West = afternoon sun

East = morning sun

North = shade

“Does the roof have enough space to fit two mid-sized sedans?” “How is the roof positioned?”

“Is it shaded more than 50%?”

Consider all seasons and time of day. Look for any and all obstructions: chimneys, trees, poles, other structures, hills.

“What is the Roof Material—Good for Solar?”

- Composition Shingle
- Concrete Tile
- Flat
  - S-tile
  - W-tile
- Clay (check with your local market)
- Metal-Split Seam
- Wood Shake (usually not good for solar)
- Flat/Rolled

“What is the Roof Condition?”

If the roof has less than 10 years of life remaining we will need to have a reroof. Look for damaged, warped, sagging and weathered roofs for clues; however, the most accurate and telling is when the site audit occurs and the branch determines that a re-roof is needed.

Time Saver Tips and Time Management Reminder:

Before you begin knocking have a predetermined plan on where you will knock, how long you will knock, and what you require of yourself. Determine what will happen when you face rejection and how you will react to it when it happens. Have your planner/lead management record keeping tool ready and any other resources needed to tee yourself up for success.

Before approaching a home, visually see the practicalities of the home. Look for shading, roof types, direction and orientation of the home, cars in the driveway, tire tracks/marks into garage, existing solar, meter reading, gas meter proximity, & other identifiers. Record everything in your area tracking tool. This will help you with time management throughout your day. Look for disqualifying factors so you don't waste time prospecting.

## The Steps

1. Introduction (first 15 seconds)
2. Gain and Pain (fixed predictability and rates on the rise)
3. Qualify & Transition (usage and consumption)
4. Why Solar (how power will be fixed now)
5. Set up a Return Appointment

## Overview on Rules of Communication

- Posture/Tone/Speech throughout the pitch:
    - Posture-open yourself to the biggest part of the front entry
    - Tone-it is better to be too quiet than too loud. Ending the phrases you use with a downward intonation is better when saying sentences.
    - Speech-better to be too slow than too fast.
    - Simplicity-Keeping the message simple (KISS-Keep It Super Simple)
    - Belief- Understand and believe what you're saying
    - Is the pitch working? If not, ask yourself how you're doing in these areas.
- Reminder: review and track your sales funnel ratios with your Mentor.

**Tip: Getting them to hold something will help open them up for future conversation**

Appointment Pro Guide The Model of the Pitch

The model is a **STATEMENT**, then a **QUESTION** at each phase of the pitch; here is a quick example:

Statement: “Hey, sorry to bug ya, I’ll be quick. I’m here about the [power project].”

Question: “Is this still the Henry residence?”

## **STEP 1: Introduction**

The most difficult, but most important step of the whole pitch is Breaking Pre-Occupation. Homeowners are conditioned to having people coming to their door, so saying “No” to a door-to-door sales person isn’t out of the ordinary—get used to this response and work on overcoming it. We need to break the mold of every other sales person and do something different. Remember this quote from Napoleon Hill:

“Before success comes in any man’s life, he is sure to meet with much temporary defeat, and, perhaps, some failure. When defeat overtakes a man, the easiest and most logical thing to do is to quit. That is exactly what the majority of men do. More than five hundred of the most successful men this country has ever known told the author their greatest success came just one step beyond the point at which defeat had overtaken them.” — Napoleon Hill, *Think and Grow Rich*

## **The Opener**

The opening line is going to be important to memorize and be the same at almost every door. Using their name in the right way will be helpful to increase attention. You will want to avoid initially mentioning their name as the first thing out of your mouth. Refer to their name after a quick opener. Using the word “still” infers that at some point, the Henry’s lived here which verifies without sounding interrogative.

### **Opening Statement:**

“Hey, sorry to bug ya, I’ll be quick. I’m here about the [power project].”

**Question of Intrigue:** “Is this still the Henry residence?”

You will want to initially avoid saying the stereotypical sales person phrase of, “Hi there, I’m Caleb with [Company].” Saying your name or what company you’re with right away turns them off because they ARE CONDITIONED through HABIT to think you’re a salesperson and shut down. The last 20 guys have said that exact same thing! Every salesperson before you has done it.

You will want to be short and to the point; end this step of the approach with a question to make sure they are engaged. Try to keep this verbiage exactly as you see it above. This is the most important step of the whole sale! If you do not engage them, they will not be listening to you; therefore, no sale.

Example: “Hey, I’m Jim with Solgen Solar, how are you doing?” (DON’T SAY THIS)

Tip: If you know their name before knocking on their door, it is usually very effective to address them using their name. “Great. Is this still the \_\_\_\_\_ residence?”

Explanation: The reason why we ask for their name is because it gives credibility.

Studies show that when you’re an acquaintance of someone, they are more likely to listen to you. Think of when AT&T or someone calls 9 you and they say, “This is AT&T, we’re calling to perform a survey...” it’s likely that you will hang up immediately. On the other hand, if someone calls you and asks, “Is this Mr. Jones?” You are going to say YES. You can’t hang up on someone that KNOWS you. They have your attention, and you give them more time.

You can interchange the words in the bracket with market specific language. It’s best to sound local. This comes from Law of weak ties

## Intrigue

There are many ways to create curiosity. Use this step to validate yourself as a trusted advisor in the neighborhood. Name dropping, referencing a circumstance that they should be aware of already—you need to have them connect your presence being there with something they are already familiar with. When you can do this it creates a trust deposit in their mind. The more trust deposits you can make, and quickly (you don’t have much time here), the more they’ll listen to you and ultimately buy. There should be something important going on relevant to them and they should want to know about it. Ask one of the following:

- if their neighbors have told them what’s going on
- if they have seen the blue utility trucks
- if they lived here when the digital meters were installed
- if they’ve looked at their utility bill recently
- if they’ve gotten a notice from their utility company
- if this is still the Jones’ residence
- if they’ve been informed about the frustrations of other neighbors’ utility rates

- if they've heard of mandates needing to be met

## Explanation

You need the customer to know that you're the professional and you know what you're talking about because you are there for a specific reason. Once you have them listening, you need to validate your presence. The best way to validate your presence is asking those above questions of **Intrigue**. There are many various options listed, but it's critical that you use a question to capture their attention.

**Question of Intrigue:** "Were you here when [Utility] (say utility name) swapped out the meter?"

The customer needs to know that you know something specific about their home or local reason to justify listening.

**When you know you have their attention**, and they think that this seems to be relevant to them, you have successfully set up your pitch. **Well Done, 90% of the work has been done!**

## STEP 2: Gain/Pain

This step highlights the product and explains why we are here. In this step, you make a simple explanation of a benefit to the program. Tell them what is happening and why they should care. There are some changes in the laws in the state on how power is being distributed. We as Solgen, are “bringing in” or “generating” or “producing” more renewable power in the state/area.

**Informational Statement:** (Example): “Here in the state, most of the electricity is being shipped in from out of state or far away which is why the rates are going up. Hopefully your bill wasn’t too high last month? They’ve lost power from the shutting down of Nuclear Plants (which is causing rates to go up). We step in and increase that deficit with adding more power in this neighborhood.

**Interruption Statement:** I know you guys get hit up a lot with companies trying to sell you solar, but this is a little bit different. You don’t have to pay 30,000 dollars for solar today.

**Find Out Question:** Due to these extra fees that go along with it, we have a lot of people who are seeing if solar can make sense for them. Just curious, why haven’t you guys gone solar yet?”

This should surface any objections and you can agree with them. It is very important that you don’t forget to AGREE with them:

**Validation Statement:** “Oh I see, that makes perfect sense, that’s actually the exact reason I’m here. Has someone been by from [the Utility] to explain how the fees work?”

Your job is to find out why they haven’t gone solar and to help them realize that there is a benefit and an easy route to get on board. This is the fastest way to surface any objections because it comes from a place of indifference. You should come across indifferent to them whether or not they deal with you. You also need to create a need to hear you out. A mix of pain and gain points will be your goal here.

**Pain/Gain Statement:** “My job is the easy part, what I’m doing is educating the public on how this project will impact your electricity rates. Basically, if you can participate, you’ll get a discount on power. And if you cannot participate, you’ll most likely see a rate increase. All I’m doing is surveying homes to see whether or not you’ll qualify for that cheaper power. If you happen to use more than [x amount] kwh a month, the home qualifies and you get to buy power at a reduced rate. If not, you just have to stick with the tier program.”

**Question:** “Are you familiar with the tier structure on your bill?”

CUSTOMER: [Yes or no]

Did you catch the pain and gain part? Why is that effective?

Here's another example:

**Pain/Gain Statement:** "It's pretty much a no brainer for everyone we've talked to THAT CAN qualify for the program. If you qualify, great! If not, you just have to stick with [Utility]."

Explanation:

The reason we say "program" is you want them to understand the concept of smarter/less expensive energy first before you bring up the word "solar". It doesn't matter how good our product is, if people have their guard up because they've talked to another person about solar, they think they know enough and push you away. You want them to understand the basic concept of cheaper/cleaner power first and foremost.

Tip: No one ever likes to HAVE to do anything. Playing by the utilities' rules are not in the customers' interests; help them see that there is a much easier option where they can take control of their future rates.

ONLY IF the customer resists, use a Supporting Statement: "It's pretty simple, the more power you use the more you pay. Like your water bill or the opposite of Costco."

The customer's water bill is typically set up on a tier structure too; you usually want to relate how they pay for power to something else that they already understand.

Now, introduce solar:

...Basically what the program does for the bulk users like yourselves is allow you to buy the power being made here ON SITE, just like you've seen before with solar on the rooftops. Meaning, it reduces your cost because the shipping costs are going to be diminished. In other words, you don't HAVE to buy solar panels cash anymore. You continue doing what you already do which is buying what you need—just pay a fixed amount for it. It's cleaner power that's being produced from your own home. It helps the customers that pay higher rates from the tier system and locks you into the lower rate. It's awesome."

## Pull Back

Pulling back means that you're adding a qualifier on your statement. Certain conditions need to be met in order to take the next step. Adding pull backs to your approach is not only smart, it is effective at creating intrigue. Customers typically want what they can't have. When presented with two choices, human nature is to want the choice that isn't available or what we can't have—the forbidden fruit. It's a built-in, innate force of defiance; the achievement of proving that people can get what they are told they can't have. George Loewenstein, an American educator

who studies the link between economics and psychology, is known for his “InformationGap Theory,” which could help explain this behavior. According to Loewenstein, something significant happens when we feel a gap between what we know and what we want to know: curiosity hatches. As a result, we often feel the need to take action, to do whatever it takes to bridge that gap.

**Clarifying Statement:** “Not everyone qualifies, and so our job is the easy part, 1. determine which homes are eligible and 2. help out with the enrollments.”

**Customer:** “How do I qualify?”

Supplemental Verbiage ONLY IF you feel the need to explain. Hopefully by this point, they get it and understand their upside in doing this.

**Statement:** “Instead of having to pay upfront for panels now, you can just pay for the power the solar panels produce with similar payments to what you pay anyway to [utility].”

**Question:** “My guess is that you have said no to solar because you don’t want to spend the money or have increased debt/liens, right?”

**Statement:** “No, EXACTLY.... you don’t have to now, this program is a lot different. But if your roof gets enough sun, solar panels collect electricity, and you benefit by producing power from those panels on your roof instead of buying your power from [Utility].” **Question:** “You get to have a choice now, finally, huh?”

**Statement:** “In other words, we pay to have the renewable energy source installed at no cost to you and you just get a reduced energy cost each month.”

**Question:** “Does that make sense?”

Look at them and wait for a response. Based on what they say, usually questioning the legitimacy and they usually ask something like “it’s free?”, you can then take the next step of the Approach naturally. Agree deliberately, and talk about the benefit for Sunnova, the benefit for the utility, and the benefit for the customer. Tip: Asking, “Does that make sense?” often enough ensures they are following you.

How does each party benefit?

Utility

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Company

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Customer

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## Re-cap

Your message should be simple here—that utility customers are being overcharged because of the WAY the power is delivered to the home. Now there is a smarter way, where power doesn't have to come as far to reach the home—only a matter of feet, which cuts cost. The logistical remedy to the way distributed power companies are charging customers is the main message! Be sure to explain this so simply that a customer cannot misunderstand; this will build intrigue most of all and makes them want it more when they understand it.

**Explanation:** Always bring up the “solar” word before they do so they don't think you're scared of it. They need to understand that we are simply a utility company and the problem/solution. Understand that there is a certain level of balance of when you bring up rooftop solar for some markets that have seen some exposure to door-to-door sales people. You don't want to get stopped by someone saying no to you through preconceived notions of solar (they think they don't qualify because their bill not being high enough, not enough consumption, moving soon, and/or losing their investment isn't applicable).

## STEP 3: Qualify & Transition

In this step you pull monthly usage details and understand their current usage and what they pay for that consumption. We need to be sure they are a good fit for solar; in this stage you will qualify them or leave them to their day as promised before.

**Indifferent Statement:** “Not here to do much today, and I just do the easy part here, there's a couple things that allow you to be eligible:

Qualifying Questions:

1. “Your roof has to be in good shape. Do you know how old your roof is?”
2. “You’ve got to be using the minimum amount of power to qualify, do you know how many kW hours you used last month?” (Most people don't know, this is a another great lead-in to the bill review)
3. “Credit has to be over 650, will that be an issue?”

There are 3 ways to check usage. There is no right or wrong way, there are only faster/slower and more/less accurate ways.

The fastest way but not as accurate:

- Direct the customer to grab their paper bill (if available) and manually “eyeball” the history data. There are no hold times to this route but it won’t be as accurate.

The **two most accurate ways** but can be the *slowest*:

- Calling into the utility company customer care number and having the customer give permission to release the history data
- Direct the customer to go online and access history data

Local Utility Phone Number \_\_\_\_\_

## Transition to the Bill

**Statement of Indifference:** “Cool, all I’m here to do today is just check on your usage if you are qualified or if you’re not so I can leave you to your day. Once I see that, I’ll be able to tell, right away, if you guys are eligible.”

**Option Question:** “Do you do paper billing with [Utility], or do you do everything online?”

**Directive Statement:** “Ok, if you could grab that for us real quick.”

Show them a visual aid on the tier structure or an existing bill that shows the tiers from other customers in the neighborhood (with their permission) as an example of what you

need to see on their bill. Then direct them to go find a recent bill. Once they bring it back to you,

**Transition Question:** “Is there a small place for me to sit down real quick so I can run these numbers?”

Look around and then shuffle feet and get in. Once inside, there are a few crucial questions you need to ask to set the stage for a successful presentation delivery.

**Question of professionalism:** “Would you like me to take my shoes off?”

**Directive Question:** “Let’s just sit down right here real quick so I can take a look at this for you guys.”

**Closing Question:** “Do you have an extra pen?”

Once you get the bill let them know you’re going to calculate the usage and send it off to the Design team to see, in a matter of minutes, a few things (to help build more intrigue):

**Next Step Statement:** “The design team will give us a couple things:

What your new bill will be to the penny.

They’ll also give you what your savings will look like compared to doing nothing and staying on current utility rates.

**Closing Question:** “Pretty easy, huh?”

## Step 4: Why Solar

Explain how we are able to capture these benefits that you have been talking to them about (Fixed predictability, control, grandfathered rates, discounts, no more tiers, etc).

Like their neighbors, they can get solar when it makes sense too.

**Informational Statement:** “They will take a look at the top of your roof from a satellite view and based off of how much power you use they will tell us how many panels you will need/are going to receive.”

**Option-Close Question:** “Do you have a preference of which side of your home the panels go on? Front or back?”

Critical note: Make sure they understand why solar would need to be producing power from on top of the roof or on site.

Note: If they cannot meet or resist spending more time with you complete the following:

### Alternate Ending, Set the Appointment

Set the correct expectation by letting them know that both husband and wife will want to be present as this is different than most presentations: there is a lot of ground to cover together and a lot of new information that both will want to be there to understand and ask questions.

“It’s just the way it works best when doing these with other homes.”

Make sure you let them know about time expectations.

“We should be 30-45 minutes, but I can stay as long as you need me to for questions.”

Have them have their bill ready and printed. Leave behind a reminder card and printed, company marketing collateral. The welcome packet or some other leave-behind works perfectly for this.

After getting the customer on your calendar, look at them and ask,

“Hey last question, can I ask you for a favor? I live 30 minutes away and I work only by appointment, so I work really hard to manage my calendar and appointment times. What

I ask is if for any reason you need to reschedule this appointment, can you give me a 24 hour notice? That gives me a chance to backfill that spot.”

The response you’ll most often get is, “Oh absolutely, I’ll be here Thursday 6:30PM,” (the potential customer almost always reaffirms the agreed appointment time). And once the customer says it, now their word is on the line and it is now THEIR commitment instead of just yours.

Once they respond to your “favor,” look them in the eye and say,

“Thank you, I really appreciate that.”

Reach out for a handshake to signify that it’s a deal.

Oftentimes customers don’t show up when they feel the sales rep has given them an out.

For example, they didn’t have your number to call them to reschedule or they didn’t hear from you after the initial contact and they weren’t sure if you were coming. Or the customer didn’t write down the appointment and life got busy. Make sure they know that you’ll be there. Add each other as contacts within each other’s phones and send them a text right away. Send a video link to them and thank them for their time. Your customers should have zero excuses to not be there at the appointed time, so make sure they KNOW you’re going to be at the appointment and give a couple different ways for them to reach out. Not only are you giving them no excuse to not remember, it’s showing them you’re a busy professional and this isn’t just a dinky door-to-door amateur who is hoping to get a deal. You’ll want to come across professional, seasoned, and busy. All opportunities should have the feeling, if people in their neighborhood do solar, they do it through this guy! If they respect you at the door, they generally respect the appointment. You should expect nothing less.

“You get what you tolerate.” — Tony Robbins

Most cancels or no-shows cancelled the day of appointment because you are an afterthought to them—not a priority. It takes a proactive person to cancel 24 hours in advance and most people don’t think in advance. Just to spit out an agreed appointment and then showing up will most surely end up as a failed appointment and a waste of time for you; you didn’t build up the desire to sit down in the first place well enough. Because the appointment was so weak and they didn’t hear from you besides that one brief door approach, they can quickly replace you in their life and have no remorse for missing your appointments or standing you up. Bottom line is, make sure your approach isn’t time wasted because you setup a weak appointment; if you went through the trouble to get that far, make sure you do everything right in this section.

Customers who accidentally miss appointments should feel super bad. One DM had this example happen,

“I made the appointment with the wife, who forgot to tell her husband. She was a no show, when I called her while at her house she felt so bad, but was in school. So she called her husband at work 20 times because he didn’t answer and wanted him to get home to come meet with me! She knew I had driven 35 minutes out of my way and only worked by appointment and knew it was a big inconvenience for me and that I was very busy. She ended up rescheduling with me.”

## **DQ/Redesign-Proof designs**

Make sure to put in all 12 months of accurate usage the first time. Receive the 12 months of usage from the bar graphs on their bill, calling in and receiving consumption data and bill amounts, or having them log-in to view it there. If you can’t see how much power they use from the bill, a call to the utility may be needed. Based on how long they’ve lived there, you may not need the whole 12 months. Check with your manager on what is needed for less than 12 months as it may be different from utility to utility.

## **Submit Lead**

Send the usage off to get a design back (send over details pending the installer, usually this can be done through Canvass). Be sure to add any notes to the designers of any specific needs. Example: “Designers, please be sure to only design on west/back side and please maximize the amount of panels.”

## **Handling Door Objections**

These are handled differently than real objections typically faced within the home. They are usually prospects who are gently trying to get rid of you. So you must acknowledge them but move on quickly to your next point in the approach. Remember to practice good ART (the ability to AGREE, REPLY, and TRANSITION) when dealing with an objection. Here are some examples below:

## **Common Responses**

C: #1. Are you selling solar? Not interested.

R: Are you asking if I sell solar panels? Were you thinking solar requires a bunch of cash upfront? We are doing something a little bit different. The programs available don’t require anyone to have to pay out of pocket expenses, like a cash investment. Honestly it’s too hard for us to require, so I’m doing something much easier today.

C: #2. Not interested.

R: I'm sorry, you've probably been harassed by tons of guys trying to sell you solar. They make my job really difficult. I'm here to find homes that qualify for something a little bit different. Have you heard about your neighbors who are on this program?

C: #3. Not interested.

R: Not interested in what? I'm actually just here about the power project that we're going to be doing here the next few months. It may not pertain to you anyway, depends on your bill amounts. Do you pay over \$\_\_\_/mo to (utility)?

C: #4. Not interested.

R: I hear you, was your average utility bill less than \$\_\_\_/mo then? Because this won't apply to you if your average bill is less than that. Hopefully it is. Do you know about the monthly high and low of what you paid last year?

C: Costs too much.

R: I agree. That's why I stopped by. I've been working with a lot of the neighbors who qualify for a slightly different program. This program is for homeowners who want solar but don't want to spend the money upfront to purchase it. Either they are moving soon or would rather save their money. Do you know the Jones's very well?

C: I need some time to research.

R: That's actually why I'm out here. Many of your neighbors like "Jim" are interested in solar but need more information. My job today is to get you the information you need to understand if solar is right for you, that way you can know for certain if it makes sense. Some homes have solar and definitely shouldn't have it.

C: #1. Can you leave me with some literature?

R: Absolutely, that's what I'm here for. Can I ask you a question? Why haven't you guys been able to get solar yet?

C: #2. Can you leave me with a brochure?

R: Absolutely, that's what I'm here for. Can I ask you a question? Was there a reason you guys don't have solar yet?

C: #3. Can you leave me with a card?

R: Absolutely, the next time I am in the area I'll drop it by. My job is a little bit different though. ALL I DO is see which homes qualify for the power program. Cost of electricity bills and good roof faces are factors. At this phase, it's too early to know if solar can even work for you. Once I get an idea of how much electricity you used last year, I set up a time to bring back a proposal and all the literature we have so you can make up your mind THEN. Was your last month high, middle, or low cost for you guys?

C: #4. Can you leave me with some literature?

R: Absolutely. I've been putting together a couple options for many of your neighbors already. Like you, they want to know if solar is right for them. My job today is simple. I'm here to get your electric usage. With that info, I can return and give you the information you need to see if solar makes sense—because you don't want to do something that doesn't save you money right?

C: We are waiting for better technology.

R: You're saying you'd rather wait for better panels to come out? I can see why you're saying this. If your home qualifies for the PPA program, you won't have to worry about that concern. Have you heard of the PPA program?

C: I don't want to sign up for a long term commitment.

R: You're saying you might not want a contract, right? Good concern; the reality is that we are all under contract with our current power company. If we don't pay them money for the energy we use, then we get disconnected. Is there ever a time in the future where you feel electricity won't be needed?

C: I'm concerned that the new owners won't want the solar.

R: Great question, the best part about this is that the system actually helps the home to sell quicker because the cheaper cost of living that comes with buying it. It's a selling point. In some cases, it actually raises the value of the home to the seller and buyer. The homes that have pools are similar. If the buyer just doesn't want a pool, they won't come look at your house. If we list it correctly with the home sale, it becomes a no-brainer for them to have cheaper bill for their electricity. 99% of all homes we have installed solar on them transferred successfully! So was your last month higher or lower than normal?

# Full Approach

“Hey, sorry to bug ya, I’ll be quick. I’m here about the [power project] from Solgen Renewables. Is this still the Henry residence? Were you here when [Utility] (say utility name) swapped out the meter? Cool, here in the state, most of the electricity is being shipped in from far away which is why the rates are going up. You’ve probably noticed your bills increasing over the last few years. Due to this, we step in and bring more power into the neighborhood. Not to worry, this isn’t a program where you have to pay out of pocket for solar panels. I know you guys get hit up a lot with companies trying to sell you. I’m doing something a little bit different. Just curious though, why haven’t you guys gotten solar yet? Oh I see, that makes perfect sense, that’s actually the exact reason I’m here. My job is the easy part, what I’m doing is educating the public on how this project will impact your rates on electricity. Some of the homes here will get a rate lock guarantee, other’s will see rate hikes. Basically, if you can participate, you’ll get a discount on power. And if you cannot participate, you’ll most likely see a rate increase. All I’m doing is surveying homes to see whether or not you’ll qualify for that cheaper power.

Are you familiar with the tier structure on your bill? It’s pretty much a no brainer for everyone we talked to THAT CAN qualify for the program. If you qualify, great! If not, you just have to stick with [Utility]. Basically what the program does is allow you to buy the power being made here ON SITE, just like how you’ve seen before with solar on the rooftops around here... creating a rate reduction on your cost because the shipping costs are going to be diminished.

In other words, you don’t have to buy solar panels cash anymore. You continue doing what you already do which is buying power—just pay a fixed amount for it, it acts like a bill swap—from dirtier variable cost power to cleaner fixed cost. It’s awesome. Like I said this doesn’t mean that you have to purchase panels, but not everyone qualifies, and so our job is the easy part: (1) determine which homes are eligible and (2) help out with the enrollments.

(Customer: How do I qualify?)

I just do the easy part here, there's a couple things that allow you to be eligible:

Qualifying Questions:

1. Your roof has to be in good shape. Do you know how old your roof is?
2. You’ve got to be using the minimum amount of power to qualify, do you know how many kW hours you used last month? (Most people don't know, this is a another great lead in to the bill review)



## PART 2

# The Sale

Follow these best practices in detail and have drastically better closing ratios. You should close no less than 1 in 4 appointments that you sit. Memorize the steps of the sale for flawless execution. Know the words to say and the words not say.

Words to Avoid	Improve with
Contract	Agreement
Signature	"Authorize" or "Approval"
Sell/Sale	"Requests" or "Orders"
Presentation	"Your savings" or "Your new bill"
Present	Show
Proposal	Option
Sorry	Apologies
Please	Try not to plea for anything
Cost/Price	Investment
Buy	Own
To be Honest, Honestly Prospects,	Unnecessary filler word that implies you've lied at some other point
Customers	Clients
Obviously	Denotes that your customer should know, sounds condescending
Cheap	Value
Competitor	Don't bring up the word, position what you are selling as different and meets their needs with high value
Objections	Questions or Areas of Concern

Commission	Don't bring this up, everyone knows you're working for yourself
Advice	A similar experience in the past..
Problem	Challenge

## Before Presenting

### Know the Deal

Prepare yourself by reviewing the opportunity's proposal and side-by-side documents. Check to see if they are in a trust or who is on title. Verify the roof quality, panel spot and the gas line position. Check for the practicalities of the home. Ask them if 650 credit score will be an issue if you feel the need. Refer to Time Saver Tips and Time Management.

### Attitude and Entering the Home

Look good, feel good! Before the return appointment greeting, convince yourself that you are the right one for the job. No one else is better suited for presenting and you should never have any hesitations about who are and how good you are. If this is a return appointment, don't park in their driveway. You should have already triple confirmed with them at the time of the setting of the appointment, so there should be no need to text them or call them to confirm again. Even if they do forget, it's more difficult for the customer to tell you to go away in person than over the phone. Show up on the minute of the appointment. If you're going to be over 20 minutes late, show up in person and you can say, "I apologize for the lateness, I was kept late by a previous appointment." Duck your head and approach the inside of the home. Ask,

"Would you like me to take my shoes off?"

TIP: Objections "Questions" or "Areas of concern" Commission Don't bring this up, everyone knows you're working for yourself Advice "A similar experience in the past.."  
 Problem "Challenge" Words to Avoid Improve with

# Build Rapport

Family  
Occupation  
Recreation  
Message

Always start the presentation off with this format. In order to get into FORM, start with a compliment. People love to hear that they did great at something, or made a good decision, or hear about something that they did. Keep it sincere and don't say it unless you really mean it. Look for anything that can be complimented.

TIP: Make sure you listen ACTIVELY. Stop, look, listen, add. "Adding" means you add your own relevant comment or question after you listen to them. In the next section where the energy profile is being created, you're going to want to add your own questions and comments after each questions so that it doesn't come across like an interrogation.

STOP: "Beautiful kitchen! Did you guys just remodel? Who did it?"  
LOOK AT THE CUSTOMER; LISTEN WITH YOUR EYES: [CUSTOMER RESPONSE]  
ADD: "Looks professionally done! I'm going to have to get you to come over to do my house tomorrow! (Laugh)  
TRANSITION: So where are you guys from?"

Move the compliment to the first letter—Family. They need to know that you care and that they aren't just an object to you. Showing interest in them before getting to the "M", (which is why you're there, your MESSAGE), is a great way to establish trust and will mean a lot when you are getting down to decision time for them, they will tip to the side of WHO they LIKE the most if in a moment of indecision.

## Set the Agenda

Follow this 3-step process when beginning your presentation:

1. Thank them for having you over.
2. Separate yourself from the crowd with a personalized value proposition
3. Set the agenda

Setting the agenda is important because it takes control of the presentation. Rather than having a Q and A the whole time and aimlessly hoping to close the deal, it adds structure and an end in sight. Every other formal meet-up has an agenda—rehearsals, recitals, shows, concerts, religious and political meetings all have structure like this. **Value**

**Proposition:** It is a 1-minute elevator pitch that captures attention, invites intrigue, and creates a desire to listen or want the product.

“All companies generally do a good job, but things are done a little differently at Sunnova. Our main goal is to create a planet run by the sun. Those that qualify simply pay a lower, fixed rate for power than they currently pay instead of needing to put any money toward panels. We believe that the customer, not the utility company, should have the choice in whom they pay for power. With Sunnova, you get the largest dedicated residential service provider in the nation with a high-trust, exclusive partnership with Solgen to bring you the best in product and customer service out there. Being clean energy consumers and money savers is just smarter.”

Set an Agenda below by writing down what you should say:

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# Energy Profile

“Not everyone qualifies for solar, but we want to make sure you are given a fair chance at converting to solar only if it makes sense. Although this won't cost you anything and requires no deposit of investment, we like to ask a few questions to our potential customers to see if and how solar should work for you in the future.”

In the last 12 months, what are some of the things you've done to be more energy efficient?

You say your average bill is around \$\_\_\_\_\_ per month...what do you think it would be if you actually used the energy like you would like to?

Does your family plan to grow or stay the same or anyone moving out?

In the last 12 months, were there any new purchases or home additions that would've increased your family's usage? Any In the future?

When was the last time you replaced the roof?

- Clay tile roof
- Ground Mount
- Flat Roof

MPU required? Yes/No/ Maybe (circle one)

Gas line far enough away from Electrical Panel? Yes/No/Maybe

Obviously you didn't choose [Utility], but what is your biggest frustration with them?

Who typically takes care of the bill?

If you could pick any location on your roof for the panels what area would that be?

CARE/Discounted customers, do you see your family ever DQing for CARE?

Did you in last 12 months or Do you plan on getting any of the following:

- Electric Car
- Pool/Hot tub
- LED Lighting
- New Appliances
- Whole house Fan

- New Air Conditioner

Has the home ever had Time of Use Rates or Power Outages?

When do you plan on moving? <10yrs or >10yrs

If it made sense, do you currently have money set aside for the purchase of solar?

Do you owe taxes at the end of the year or get a return from the IRS?

Last year you paid for \_\_\_ kWh \_\_\_\_\_ that costs \_\_\_\_\_ \$\$ \_\_\_\_\_.

Your energy usage will: (pick one)

- Rise
- Stay the same
- Go down

Your best option is:

- Financial (Pick one)
- Full Upfront— Purchase or Prepay
- Monthly— Finance, Lease or PPA (monthly flat, monthly esc)

- Maintenance (Pick One)
- Homeowner maintains after warranty is finished
- Sunnova Maintains for 25 years

## 4 Commonly Asked Concerns

You will want to tell your customers what other customers are asking.

### **Is there any sort of time commitment to me?**

Once we convert your house to solar, it's converted to solar. It's not something we or you will want to take on and off. We warranty the panels for 25years, so the time commitment is 25 years for the company to provide service for this home. If you move, we continue to be the service provider for the home and the new owners.

### **What happens if we move?**

If you move, you move. We will work with your realtor/title company to transfer the solar agreement to the next homeowner. It's easy to do and it even adds some value into your home. We have had a 98.7% transfer success rate historically.

## **What about maintenance? Insurance? Roof?**

**Maintenance:** As far as any maintenance costs, we take care of them. They're pretty maintenance free but every now and again the system may need some attention. We monitor your system for you and will know if something is wrong. When that happens, we will set up a time to fix it at no cost to you. [Opportunity to discuss Sunnovas production guarantee].

**Insurance:** You won't have to report this agreement to your homeowner's insurance company because we insure it for you. We have a \$2M annual policy on every system so no matter what happens we'll take care of it.

**Roof:** We also warranty your roof against leaks so if there's ever a leak just call us and we'll send someone out to fix it and repair any damage done. If we break a tile, we cover it. We will confirm the roof is in a good enough condition before installing the system. We require 10 years of roof life left, and once they are up they can provide a great deal of protection to roof underneath! If you need to re-roof, let us know and we can coordinate a removal and reinstallation of the system.

## **Last question, why hasn't everyone done this?**

"Good question! Most people think they need to buy these or go into an unnecessary investment when they either, A) Don't want to spend the money, or B) they know they're going to move before they can take advantage of the benefits. We are past the point of, "Does Solar work," we know it works. It's going up everywhere: Costco, Car Dealerships, Wal-mart, and other large businesses and thousands of homes daily. But now with this new program, where there might have been the concern of a lien filed against the property, or property taxes involved—that is no longer a concern. You just continue doing what you already do just change the source of power to your rooftop, and pay less—when it's broken down that simply, there really isn't any reason why ANY household wouldn't convert. So it's either:

1. Not accessible information or Afraid of Change
2. The right person hasn't explained it to understanding,
3. or the household said NO because they thought it was a lot of money or they were moving too soon."

## **Bill Review**

One of the most important steps of the whole process. Use the brochure to help explain how everything works. Tell them how much money they will be spending on energy by doing nothing over the upcoming years. Go over Delivery and Generation from their bill. Make sure they understand how Utility rates have increased and that it's probable for rates to continue to increase. You will want to work with your manager to become extremely familiar with your local bill and local utility company.

**Fact Statement:** “Your current month power bill says you paid \$148 in the month...

**Question:** “...but what did you buy?”

Tell them in a list all the Delivery charges and Generation charges they paid for.

**Fact Statement:** “This is the amount of power in kWh you paid for.” [show them the total kWh they used that month]

**Question:** “If you divided the true kWh by the price, what do we get?  $\$148/650 \text{ kWh} = \$.218/\text{kwh}$ ”

**Statement:** “You spent \$.218 per kWh this month and this year. Remember that. You spent less last year per kWh” [hinting toward the rate increases that have been taking place].

**Question:** “If you could take a guess, what has the utility raised their rates the last 20 years?” [Hope to get over 4% as the answer from them.]

**Pizza Delivery Close:** Explain that unlike a pizza delivery, delivery with electricity is much higher. Making sure they understand that buying power the way they currently do is inefficient, costly, and dirty.

**Statement:** “Ordering Electricity is like ordering pizza except different.” [Keep the conversation light and fun, explaining their bill is the most fun part!]

**Question:** “If your utility company was like the local Domino’s Pizza, you’d have a \$20 pizza showing up to your front door for \$40+! Is that a good deal? [Pause and wait]. Exactly, no, if you knew that’s how expensive delivery was would you pick up your pizza from now on? [Pause and receive answer.] That’s the deal you’re on.

**Power statement:** “If you can understand this one concept, you’ve discovered the secret to why solar makes sense.” [Pause and let it soak in.]

“There are 3 problems with this bill: No choice, non-renewable energy, unpredictable rate increases, am I right?”

**Transition Question:** “If you called your Utility and asked them for a program that lowers your bill immediately, caps future rate increases, and guarantees pricing for the next 20 years or a prenegotiated rate, what options would they show you?” [Wait for their response] “Nothing right? We have those options available finally.”

# NEM (NET ENERGY METERING)

“Before I show you the options you have, let me go over how your solar power works and how the utility works with solar” [Explain the give and take of energy from the home to the grid].

This can take some time because of the subject matter. Show them a drawing of the grid and how energy flows back (day) and forward (night). Draw a picture of the grid to the home, explain how the home pulls the power without solar and pushes power with solar to and from the grid. Explain that pulling the power makes their meter turn one way that tracks power being used and that solar makes their meter spin the other way tracking the power being produced. Check with your current utility charges from demand or connection; sometimes there is a minimum amount required to stay connected to the lines.

## Key points are:

The grid becomes the customer's battery storage

The customer will take the daytime earned credits from the grid at night

The customer will pay for the net balance at the end of the year, or get a credit for producing more energy than needed

This is the most confusing part of the presentation for most customers. Explain that they will be getting billed by two companies now. Monthly bill from Sunnova and NEM Monthly Statements and yearly true-up anniversary bill from the utility. This is a perfect time to explain how solar works and its relationship with the grid. Show that this new way by which power being produced on the customer's side of the meter is better. The utility company now benefits too, with extra supply during the peak times of the day when power is the most expensive to generate (Check with your DM to see if batteries can be offered in your location).

## Available Options

Go over the different Purchase and Lease/PPA Options. Tell them the details of each. This may take some time based on how much the customer understands or wants to know. Recommend the best option for them. You'll know the best based on building an effective Energy Profile. Explain the escalator and how they save more money long term. Have them decide which is the best option. Help clarify any misunderstandings through a few questions that ensure customer understanding.

**Option Close Question:** Which option best fits? Can you tell me why? (Allow the customer to explain why!)

**Qualifying Close:** If we can [lock in rate, allow you to use your AC more, etc...] can you see any reason why this wouldn't work for you guys? (Resolve concerns)

**The Next Step Close:** Awesome. The next step is, as I said before there are 3 things that disqualify someone from getting this: Roof, low bill, and credit; this program requires a 650, will that be an issue? Great! Let's check that real quick."

If you feel they are ready to go through with it and have no more concerns, check credit with them.

**Self Evaluation:** What are the differences between Purchasing Panels and a Solar Lease/PPA? Write the differences out.

Ownership:  
Maintenance:  
Monitoring:  
Production:  
Monthly Cost:  
APR:  
Term:  
Escalator:  
Tax Credit:  
Savings:  
Returns:  
Purchase  
Lease/PPA

## Layout, Design, Pricing

Use the Proposal to show them the newly designed system. As a rule, show them the design first. Show them the savings first, only if their design isn't favorable.

**Closing Question:** Can you picture this design of your system?

Show them a 5-year savings scenario. Although the presentation message shouldn't be geared around SAVINGS as the reason, it is good to let them know the added benefit. Let them know that this money saved isn't money they pay us or their utility, it's money they didn't lose by basically doing nothing. Benjamin Franklin said, "A penny saved, is a penny earned." Uncover pain points when explaining the scenario of losing future dollars. This is the point where they should be getting really excited about it! Help them realize the value and benefits so thoroughly that they have to say yes.

**Closing Question:** “Can you fit that kind of savings into your budget?” [Keep it light and fun!]  
“What would you rather spend that money on rather than expensive energy?”

Don't sell on today's prices and savings. Sell on the longer term savings. Focus on the consistency and predictability of the Sunnova payment instead of solely the monthly cost difference. It may be helpful to do a side-by-side of their current utility payment, the Escalator plan, and the flat plan and have them decide which one is best. Have them decide which is the best option. Help clarify any misunderstandings through few questions of follow up after they decide. “Why that one?” and “Can you tell me why?”

At last, the recap. Verify OUT LOUD that you've gone over everything and nod your head if so (This simply reassures to the customer that there isn't anything that you've missed).

**Closing Statement:** “Ok, let's make sure I've gone over everything.... [look up, retrace steps in your mind] Yep!” [To confirm, nod your head with an emphatic “yep.”]

## The Close

You need to know that you should have a definitive CLOSE at each presentation. This will uncover any customer concerns at the time of sale. This will ensure quality through install.

### **The PRICING OPTION Close (use 100% of the time):**

“Which one makes more sense? Can you see how this can help you and your family?”

Write the two/three different options out for them, simpler the better, and have them pick one.

“Can you tell me why?”

Can you see any reason this wouldn't work for you?

Great, now let's see if we can get you qualified.

We require a credit of 650 or better. Will that be an issue for you? Great. Let's verify that really quick.” [Check their credit]

### **The NEXT STEP CLOSE (supplemental):**

“The next step is to go over the points of the agreement to make sure I've gone over everything. Let's pull that up and take a few minutes to go over the key points.”

### **Timeline CLOSE (supplemental)**

“Let me show you what happens next.” Draw or show a timeline of process and length of time it will take to accomplish everything. “With a few initials, we can get this started today.”

### **The Referral Card/Visa Card Close (supplemental):**

“We also pay out Visa cards for referrals that get installed too! If I can have you write down anyone that you feel would benefit, we’d be happy to check to see if they can qualify too.”

Give them a referral card; by them writing down names, they’ve agreed to signing up with you too.

# **Sign Agreement/Schedule Survey/ Welcome Call**

## **Review and Sign Agreement**

“Now it’s my job to just make sure everything I said is in writing. This design has been generated on my device. Let’s pull that up.”

Read word for word the entire 1st and 2nd page.

Then Select "Next" and have them approve (E-Sign) the agreement. Answer any questions they have. Use the job aid provided to paraphrase the necessary material. Let them know a detailed copy of this has been sent to their email [Send them a copy].

## **Schedule the Site Survey**

“Now let’s see what time we can have someone come out to confirm your design. I’ve got tomorrow available or the next day; we will be in touch to check your roof”

## **The Verification Call (281-985-9901)**

You can now call the Sunnova Verification Department to do a call with the customer. This is a simple call at the point of sale for Sunnova to verify the data, ensure customer understanding, creates a better experience, and makes the sale stickier with fewer cancels. The call will go over the following topics: • Agreement Type • Estimated Production and Offset • Payment details • Net Metering • End of term • Cancellation policy • Initial Design Help the customer pass the call by preparing the customer before the call about all the required topics that will be asked. If at any time the customer does not agree to any of the verification points, the Advisor will turn the conversation back

over you, and drop from the call. Call back when you've resolved the customer's concerns.

“The last thing we need to do is call a Sunnova Advisor and do a quick call to verify the main points. They just go over the points that we've already gone over. They will verify that we got you down with a \$0 down and \$141/mo and not the full purchase plan. That it will produce the 11,280 kWh per year which will be 61 99% of your total usage based on last year. They'll verify that you understand NEM, where you'll buy anything used above what the system produces from the utility at the end of the year. They'll let you know what happens after the 20 years, and your 10 day right to change your mind that we give everyone. Then a recap of the design. Have any questions?”

## Collecting Payment

Ensure that you are collecting payment at the point of sale. This step will be sure to surface any further concerns the customer might have that they have not told you. “The next step is to set up your form of payment. We have that discount if you set up through auto draft, so if you will go grab a check, we just need the routing and account numbers from the bottom of it.” [Look down]

## Referrals

Follow-up is key from this point to manage expectations and to collect referrals. Best way to get referrals is to get them at the time of sale. Coach the customer to give you referrals by giving you the referral's name and number so you can call them. Give them a referral card and ask them to fill it out.

Drop hints all along the presentation to achieve the maximum amount of referrals from your customers. Example: During the Bill Review ask the customer:

“Can you think of someone just as enthused as you about their current utility? or rate hikes?”

## Collecting All Docs at POS to SRA

Make sure you are collecting all the required documents all at once so that you don't waste time trying to chase down the documents later. Be sure to check with your Project Coordinator (Junior) for the required documents in your market. These documents may include but aren't limited to:

- Utility Statements Page 1 & 3
- Photos of Main Electrical Panel, roof Underlayment (in Attic), and Roof angles
- Trust Docs if needed
- HOA documents (if in HOA community)
- NEM documents
- Proof of title (if needed)
- Golf Ball waiver for
- Address discrepancy form

## Handling Objections

### Common Objections

#### I'm Moving

Moving related customer cancellations are the 3rd most prevalent cancellation reason in the company, accounting for 9.8% of cancellations stemming from point of sale issues.

#### Common Customer Misconceptions

- Customers don't think they will see benefit before they move
- Concerned potential buyers will not qualify to transfer agreement
- Heard someone had a bad experience moving with solar previously installed
- Realtors find it difficult to work with
- Customer Feedback from cases:
  - "Due to unforeseen circumstances we are now looking to move/ sell our property, and it is no longer in our best interest to continue this process and have also been advised the same from our realtor."
  - "As I shared with the Sunnova reps that came to our home, I have been applying for a job that will require us to move out of state. It sounds like I'll be accepting that job offer and with that we will not be able to press ahead with solar on this home."

- “I have changed my mind about going with solar at this time. I'm not planning on staying in this home very long and do not feel it would benefit me to install.”

## **Common Objections Talk Tracks**

*“I know I will be moving out of this home at some point.”*

“That's great! Not to worry, Our Agreements are easily transferable to any party that purchases your home. Our Service Transfer Specialists handle everything from educating realtors and potential buyers, to working with escrow officers, title agents, home inspectors, and anyone else who might need to know about your system or solar agreement. The Specialist is familiar with the unique qualities of the customer's specific solar agreement, and acts as an agent, advocate, and educator on the customer's behalf, interacting with potential buyers, realtors, escrow officers, title agents, and anyone else that would like to know more about the value of home solar.”

*“I won't be in the home long enough to see the benefits.”*

“You do not have to make any kind of upfront payment. Once the system is activated, you will begin paying a lower kWh rate for your energy, showing immediate savings.

According to ICF International, a leading consulting firm on energy and technology, for every \$1 per year you reduce your electric bill, your home's value increases by \$20. Reducing your home's energy costs by \$1000 could increase its value by \$20,000. The U.S. Department of Energy Efficiency and Renewable Energy states that a solar house will sell twice as quickly as a home without solar panels.”

*“Doesn't it make it harder to sell the home?”*

“The Agreement should be seen as added value, as there is already a system custom designed and installed on the property where they receive less expensive power than other homes in the neighborhood at a predictable rate and have service included. This home should be thought of as a hybrid - it receives part of its electricity from the solar system, and the remainder from the standard utility company. According to the U.S. Department of Energy's Office of Energy Efficiency & Renewable Energy, Solar homes sell two times faster than homes without solar - even in depressed markets.”

*“What if the Buyer doesn't want to take over the Agreement?”*

“Usually hesitations to take on the Agreement are due to confusion and lack of knowledge about 3rd party solar. For that reason, we have a team of Transfer

Specialists here to assist you and make sure your prospective buyer understands the lower energy cost, the guaranteed performance, and the included solar servicing.

75% of homeowners who choose to go solar opt for a third-party solar service, like Sunnova, over purchasing a solar system outright.

Solar Service is the simplest and most affordable way to power a home with solar power.

Our dedicated team successfully transfers 98% of Agreements, with the other small percentage being distressed situations, such as short sale or foreclosure.”

*”How do you transfer the Agreement?”*

“Our process is simple and takes 3 simple steps: The Seller and Buyer sign a 2 page transfer Agreement. The Buyer must submit a copy of their Credit Report (we accept the copy from their lender, and would never turn a Buyer away based on Credit - if they can purchase the home, they can take over the Agreement). Once the Sale closes, we must receive a document showing proof of Title transfer (Grant Deed, Settlement Statement, etc.).

*”What if the Buyer doesn’t qualify?”*

“We would never nor have we ever denied or disqualified anyone who would like to assume the Solar Agreement. If they are qualified to purchase the home, we will always work with them!”

*”Is there a fee for the transfer?”*

“No, the transfer of the agreement is included as part of the Sunnova service package.”

*”Does Sunnova file a lien on the property?”*

“Sunnova does NOT place a lien on property, as outlined in your Solar Agreement. Depending on the jurisdiction, we may be required to place specific notices which identify Sunnova as the owner of the equipment. As a standard practice, we remove these notices once the Title transfers, then re-file them under the new homeowners name. The notices can also be removed prior to the close of the sale at the transaction’s request.”

*”What if the buyer doesn’t use the same amount of energy we do?”*

“Any energy produced by the system that the homeowner does not consume is sent to the utility company. They measure how much energy is provided to the grid and credit the utility account with the overage. If there is a positive balance at the end of the year, it is at the discretion of the utility company to pay you out, or allow the balance to roll over.”

## **Customer Testimonials**

Given how much the Utility Company keeps raising my rates; locking in my costs for the next 25 years is awesome. And I like how their team calls you to make sure you are happy.

I went to Sunnova for my project and was glad I did, I ended up saving more money with them than PGE. The roofers were great and the team was fantastic to work with.

## **What If I Move?**

### **Aesthetics**

Aesthetics related customer cancellations are the 4th most prevalent cancellation reason in the company, accounting for 3% of cancellations stemmed from point of sale issues.

### **Common Customer Misconceptions**

- Customers have seen poor installations in the past, they are skeptical about the quality of our install work
  - Customers have not seen the refined look of our panels v. competitors, they believe they will receive panels with a silver-lined bezel
- Customer Feedback from Return To Sales cases
- Customer has just had a re-roof and is worried about the aesthetic appeal of solar
- “Brad really likes the look of our new roof and doesn't want to cover it up with solar panels is the decisive factor.”
- “Our main issue was the small amount of power the panels would provide us (28%). We were hoping for closer to 40% or 50 % (likely way too ambitious). We realize this was partly due to our decision to not place panels on the front portion of the roof for aesthetic reasons ( we have a 100 year old stone home).”

## Common Objections Talk Tracks

“What if I don’t like the design?”

“We require the customer to approve their custom design before proceeding with the project.”

”Solar Panels are ugly!”

“Panels are comprised of solar cells, covered with tempered glass (like an iPhone). We choose our equipment based on creating an aesthetically pleasing roof with the most efficient equipment, highest power output and system reliability. The panels we use have robust black frames to carry a heavier snow load, anti-glare features and resistance to salt mist and dust.”

“I don’t like the placement of panels.”

“Our systems are designed to maximize the amount of energy we can produce for your home. We can work with the Sunnova Design team to create a design you will be happy with. Keep in mind this may affect the amount of energy we are offsetting.”

## Online Reviews

Some customers will simply Google the word Sunnova, and as with any company, they’ll see something they won’t like.

“I checked your reviews online and you have such a poor rating and many complaints. Plus, my friend used you guys last year and took over 8 months to get installed and two months for the utility to turn on his power.”

“I’m sorry to hear about the concern and hope to resolve those fairly easily. There are typically 3 contributors to negativity online. I’m going off of what I’m seeing online and maybe you can help further my understanding on what it is.”

1. Some people get offered a Sunnova product from one of our dealer networks (like a car, Ford has many dealers and the customer experience is different from dealer to dealer). In this case the dealer individually does the operations process from sale to installation which includes many moving parts. The dealer networks also contribute to concerns and complaints. Let me show you some customers here locally and what timelines they are on so you can see a typical customer through our local direct office. These would all be customers that got Sunnova service from start to finish (not a dealer).

2. Some of the negative press in the industry as a whole inside and outside of Sunnova is around a solar product that had liens involved. Of course that is not what I am offering by any means, but with some products they do have liens. Some do not provide protections like production guarantees & maintenance.

With these products there can be a lot of negative press directed to customers being unhappy or concerned around that product when they move or can't sell the home without lifting that lien off. Also there are some products out there that add to the property taxes which can sometimes make it more difficult to sell. Mostly though, potential customers just don't take the time to educate themselves. But that's why I'm here.

3. Last year it took the utility sometimes 2 months to turn on the system. I have even seen longer, unfortunately. But now with some of the new requirement around quicker permit turn around and interconnections I am rarely seeing any long delays.

Did I answer your questions? Like I said, I can show you local customers going solar. Our process will always be very transparent and informative. Plus, I don't think Costco would trust us to be their partner if we were really that bad. We are also an A+ on BBB.

## **JEA CHECKLIST**

New Reps (JEAs) should use this checklist when working with a EA/SEA in the field. The following checklist includes teaching and talking points that should be discussed and used on the doors.

## **How to Qualify a Home**

Roof  
Shading

## **Management**

Area Management  
Time Management

## **The Pitch**

Break Preoccupation  
Intrigue  
Problem/Solution  
Transition  
Overcoming Objections

## **Body Language**

Non-Verbal  
Meta-Verbal

Setting Appointments  
Set a Solid Appointment  
What to Do If Appointment Reschedules or is a No Show

## **Close a Deal**

Do a Bill Review  
Explain Agreement  
Transition to Close  
Sign Up Customer and Upload Necessary Docs  
Schedule Site Audit

## **Action Items**

Write Down a Pitch After Day 1 on Doors  
Pitch and Enter Usage  
Read Through the Agreement  
Do a Bill Review  
Close a deal!

## **Getting Usage**

Get 12 Months of Usage from Local Utility