

## **The Over the Phone Consultation Process**

Once the Appt is booked using whatever script was used, you are now ready to start the over the phone consultation process on the morning of your Appt date.

First Things First!

- On the Morning of your consultation (Around 8-9am) send a professional picture of yourself with this text below.

### **Welcome Text**



Hello “Homeowner”, it’s (Your Name) from Sustainable Solar. I just wanted to introduce myself as your Solar Consultant and let you know that I’ll be the one going over everything with you. Going Solar can help you receive much savings, some great governmental Incentives, and doesn’t cost anything out of pocket if you and your house qualifies. Below is a video providing a few fun facts about the solar industry you may not already know.

“5 Fun Facts About Solar”

<https://youtu.be/myEvx149b3k>

Also, please confirm our appt scheduled for today at 00:00am with a quick text back. Thanks, and I look forward to speaking to you then!

(Your Name)  
SustainableSolar&Storage  
Tel:(Your Number)

(Confirmation)

Once they receive your text, they are now aware of their appt with you, they know what you look like from your professional picture, and they have some information about going solar that will help you close the deal. This will put your homeowner at ease based on this being an over the phone consultation. They should reply confirming the appt at the scheduled time, once they do you are now well on your way to closing this deal!

(Consultation Time)

At the scheduled time of appt, reach out to your client and introduce yourself again. Before jumping into everything, build some rapport with them and speak to them as a person and not a dollar sign, ask them about their day and just build on common ground. Once breaking the Ice, take a picture of their designed solar system and text it to them, make sure it's the right house. After confirming that, start to ask the questions on the Consultation Questionnaire Sheet for you to get all the information you need to decide on what plan would be best for them. Once collecting all info needed, ask them to take a complete picture of their electric bill, front and back with the usage bar graph. Let them know you will send them a text with a few videos once you receive the bill. (Only Send Next Text Out After Getting the Bill). Also, let them know it will take about 10-15 minutes after receiving their bill for you to put all their info in the system to create their Solar Savings Report.

Once receiving the bill, now send them this next text:

### **In Consultation Video Text**

Hey “Homeowner”, thanks for sending your bill over. I’ve put together a few quick videos that should better explain the solar process to you while I finish up your solar savings report. Please look at them and write down any questions you may have. I will be more than happy to answer them all when we jump back on in a few.

2. How Solar/ Net Metering Works (Con Ed):

<https://youtu.be/rBDgfUEkrng>

3. 5 Reasons You Should Go Solar Now:

<https://youtu.be/lDC1PNC8kHI>

(Your Name)

Sustainable Solar & Storage

tel:(Your Number)

(Creating Their Solar Saving Report)

Based on the information they have given you; you can now choose a plan that you will recommend to them. Whether the plan chosen is a Lease, Finance, or Cash Deal, compare side by side your new Solar Numbers with their old Utility Bill Numbers and now you are ready to close this deal.

## (Closing The Deal)

When calling your client back, ask them first about the 2 videos they just watched and ask if they have any questions. Try to stick to asking and answering questions about the videos and nothing else as you don't want the conversation to go in a different direction.

Once answering any questions, now go into closing the deal. Ask them to write out the numbers you are going to give them so they can make sense of it as you're explaining. After giving them the numbers and explaining the difference between what the cost of doing nothing will be with their Utility Company compared to them Going Solar and those numbers, there should be a pretty big difference in numbers. Now here is where you must take control and be assertive, assume the sale and move them to the next step which will be the credit verification for the lease or the loan. For the Lease you will have to send them the Credit Application and walk them through it, but for the loan you will need to fill it out for them. (Confidence is Required) Fill out the Credit Application as if you have done it 1,000 times, if not they will feel you lack confidence and not feel comfortable moving forward. Once the Credit App is Approved, send the loan Docs and have them filled out. Have all other needed docs filled out and then enter their information into the CRM as a new opportunity and schedule their Site Survey.

Once that's done, explain to them the timeline of their solar project and let them know you'll be with them throughout the whole process. Mention and explain the Solar Referral Program to them to see if they have anyone in mind and let them know you will send them the referral sheet. Once you finish the phone call, now send them this text:

### **After Signing Up Text**

Hey "Homeowner", thank you for choosing to go solar with us. We greatly appreciate your decision. I will still be available for any questions or concerns that you may have. With this being a long-term decision, I will be with you every step of the way. Below are a few videos that will help with understating the process of going solar now that you have your projected monthly savings.

1. 5 Steps to a Solar Installation:  
<https://youtu.be/bPL0QdT2vvs>
2. The Environmental Benefits of Going Solar:  
<https://youtu.be/oIyuzgB6MmA>
3. Solar Referral Program:  
<https://youtu.be/nlX-lTrlzQ8>

(Your Name)  
Sustainable Solar & Storage  
(Your Number)