

Webinar powered by Sofdesk

06 May 2020

11 AM – 12 PM | PDT, Los Angeles

2 PM – 3 PM | EDT, New York

8 PM – 9 PM | CEST, Berlin



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Senior Editor | pv magazine



How to Boost Your Solar Business in a Virtual World



Lennie Moreno

Sofdesk



Billy Zeier

Clean Point Energy



SOLARGRAF

HOW TO SELL SOLAR REMOTELY

AND THRIVE IN A PERIOD OF UNCERTAINTY

pv magazine Webinar 2020



Agenda

Quick SOFDESK Intro

Addressing the COVID-19 situation

How to be more efficient from home

The end-to-end effect

**Custom solutions to help manufacturers,
distributors and lenders**

Demo of our latest features

Q&A

Our story

Build by installers for installers

Incorporated in 2013

60+ Employees

10,000 users

Only end-to-end remote solar software

Over 10M in VC Investment



Covid-19

It will get better

Let's not focus too much on the media

The market is innovating

Remote sales, site surveys, management...

Increase in permits, online sales, leads

Resumes May-June...

Stay Safe 



“Solar Installation
remains the fastest
growing job in the USA

2018, 2019, 2020...

Let's be reassured ... renewables remains the
only way forward so let's keep pushing



SOLAR**GRAF**

Being Solar Installers

WE UNDERSTAND THE CHALLENGE...



Reducing soft-costs is a must (4-7k per residential project)



No Home Visits / Canvassing



Paying designers, depending on other firms to do your work and using multiple programs is wasting time and money



In a 90-100 Day Cycle

THINGS CAN HAPPEN



Project Cancellation



Unpredictable Events / Change Orders



Your Burn Rate = Needs Optimization

Delays

Cashflow

Reputation



SOLARGRAF

Can we change a 90-day cycle

INTO A 30-DAY CYCLE



Close under 5 days



Follow a structure of 25 days



Get more referrals from happy clients



Start with reducing your Soft Costs by

STREAMLINING YOUR PROCESS



How do you qualify leads?



How long does it take to quote? Do you wait for the client to pick up?



How long does it take to close?



How many programs do you need to reach project completion?



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When you canvass

& CREATE YOUR OWN LEADS



Maps – Reverse Lookup / WP Pro



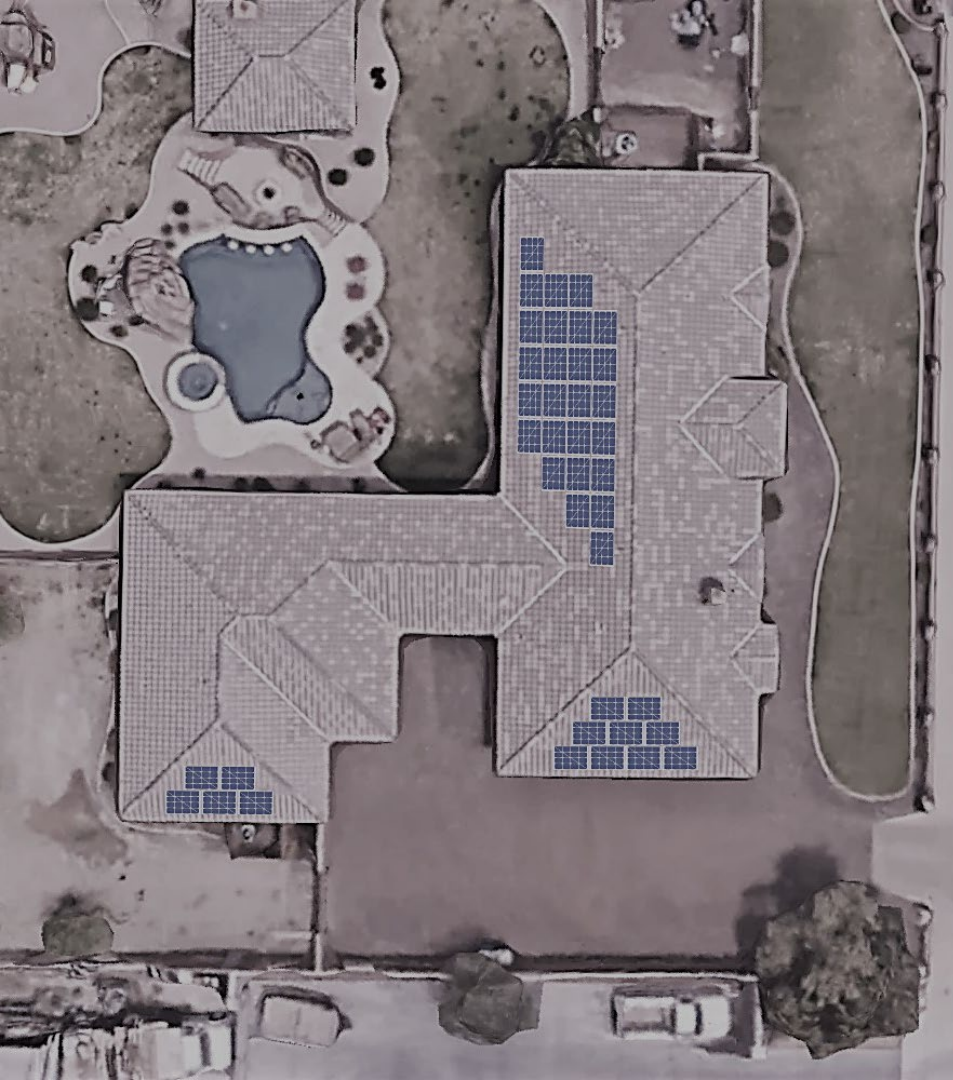
Create a referral program



Quote accurately but quickly



Create team quotas / objectives



SOLAR**GRAF**

Create a REMOTE

ACCURATE DESIGN IN SECONDS



**HD Quality from any Device
(NEARMAP / EAGLEVIEW Aerial
Imagery)**



Calculates Automatically



Needs to be Compelling

System size	5.89 kW DC	?
CEC-AC Rating	5.21 kW AC	?
Estimated Solar Savings Over 20 Years	\$19,715.91	?
Estimated first year production	9,363 kWh AC	



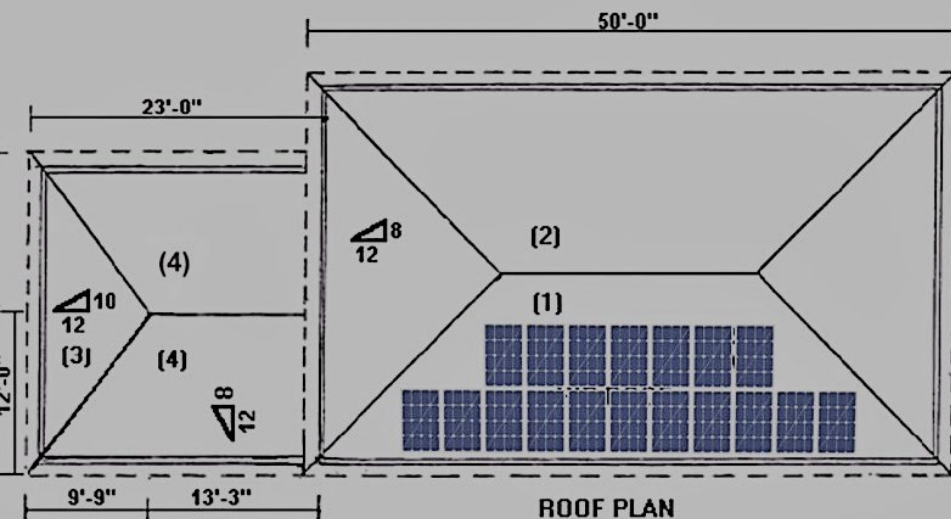
285 Trees planted



26.68 Vehicles off the road



297.85 Barrels not consumed



Location coordinates (latitude, longitude): 26.6067426, -81.8420335

House not build yet or got drone imagery?

UPLOAD YOUR OWN IMAGERY

**Drone, blueprints or other imagery****New CA legislation****Scale and quote under a minute**



SOLARGRAF

Create an accurate layout

ONE CLICK SHADING VALUES



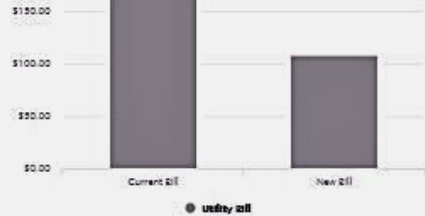
Compliant



Calculates all surfaces automatically



**Can be shown to clients
remotely in real time**



Overview

System size

3.47 kW DC ⓘ

Estimated Solar Savings Over 25 Years

\$55,173.54 ⓘ

Estimated first year production

5,442 kWh AC



2,364 Trees planted



19.20 Vehicles off the road



214.27 Barrels not consumed



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Have a compelling proposal sent out or shown

UNDER A MINUTE



Private link sent by email



**Update anything in real-time /
Screen share**



Ready to E-Sign

Cash

Own the System

\$108
Estimated Monthly Energy Payment

Cost: \$28,453
Payback Period: 11.2 years
Return on Investment (ROI): 7.1% per year
Estimated Solar Savings Over 25 Years: \$55,174
System Cost: \$19,917
Estimated Net Savings: \$35,257

SELECT

✓ Loan

Own the System

\$315
Estimated Monthly Payment

Gross Cost: \$30,000
Estimated Solar Savings Over 25 Years: \$51,000
Net System Cost: \$21,000
Estimated Net Savings: \$30,000

SELECTED

Loan Options

Loan Amount *	Interest Rate	Loan Term
\$30,535.45	2.99%	10 years
Loan Payments	Estimated New Utility Bill	Estimated New Monthly Bill
\$206.30 / Month	\$108.26 / Month	\$314.56 / Month

Direct incentives are being applied to the loan amount and change the final total loan amount to \$21,374.82.

Overview

SOLARGRAF

Offer all your

FINANCING OPTIONS ON 1 QUOTE



Show different options and payments on live quote



Qualify clients remotely & in real time



Increase closing rate & options



MOSAIC

LOANPAL

DIVIDEND



SOLARGRAF

Want to sell “adders” or

ENERGY EFFICIENCY PRODUCTS?



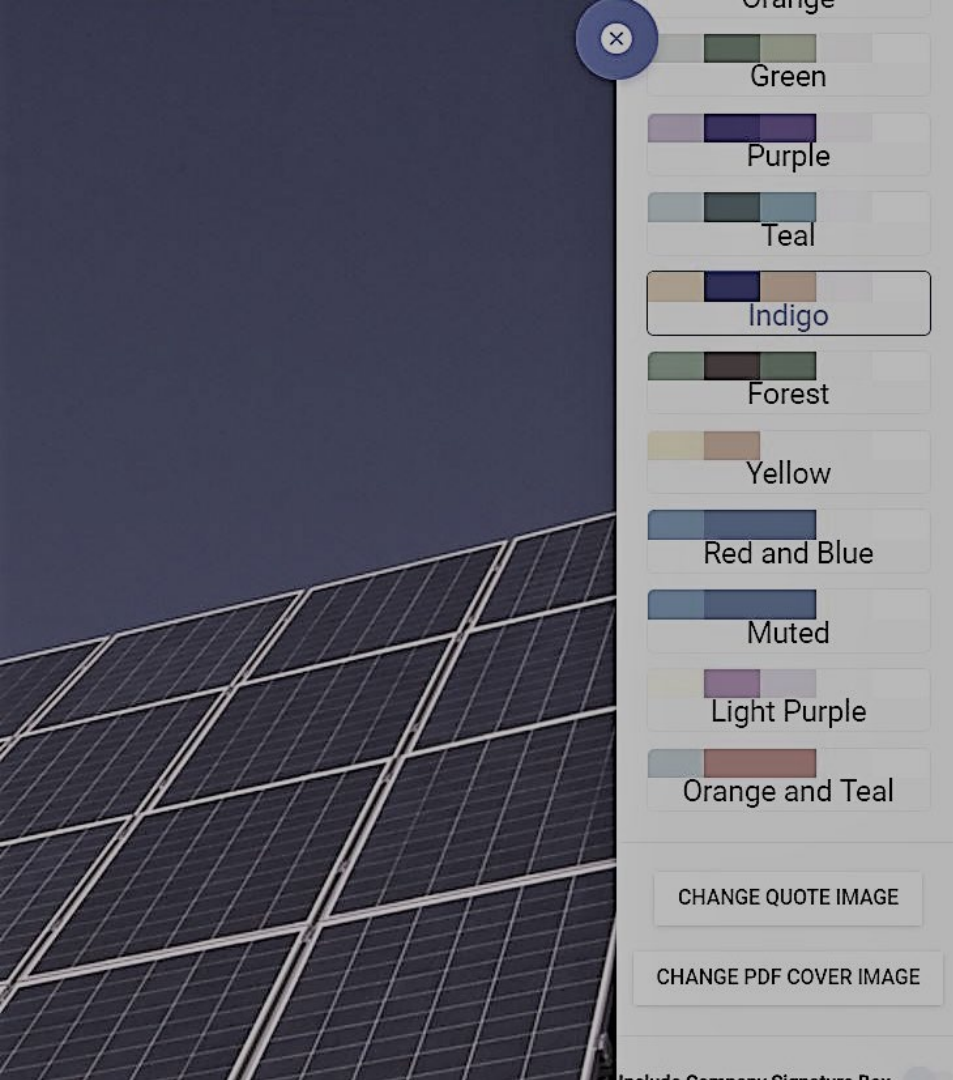
Do it in real-time



Have them ready in your adders



Will show savings on your quote!



SOLARGRAF

Make sure it's tailored

FOR YOUR COMPANY & POLICIES



Style, Sections, & Presentation



Pricing & Materials











Process, Terms & User Access



Manage Your Notifications

- ☒ Receive SMS Notification
- ☒ Receive Email Notification

-  General Information
-  Pricing
-  Materials
-  Utility Settings
-  Financial Options
-  Project Timeline
-  Manage Incentives
-  Assign Users

East Pershing Avenue

6116 East Pershing Avenue, Scottsdale, Arizona, United States

July 6th 2017

System

Proposal Sent to Client.

12:08 pm

SEND

ct Files

ments for this project



SOLARGRAF

Every Project is 1 Page

& YOU CAN DO VIRTUAL SITE SURVEYS



Add notes / comments



Take pics / Upload Files /



Change anything in real-time

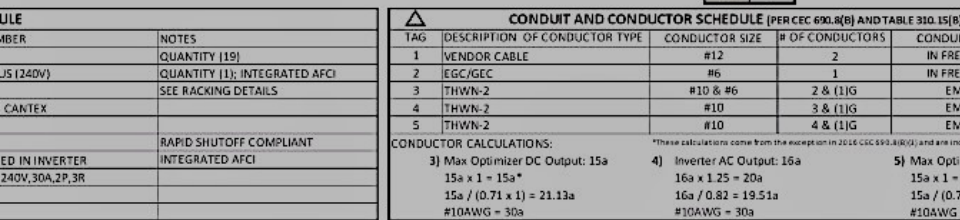


Make your team accountable

METAL WATER PIPING SYSTEMS INSIDE OR ATTACHED TO A BUILDING OR STRUCTURE SHALL BE BONDED PER TABLE 250.66 AND 250.104(A)(1).

The logo for SOLARGRAF, featuring the word "SOLAR" in a light grey sans-serif font, "GRAF" in a dark grey sans-serif font, and a stylized triangle composed of red and blue segments positioned between the "A" and "R".

PERMITS & STAMPS

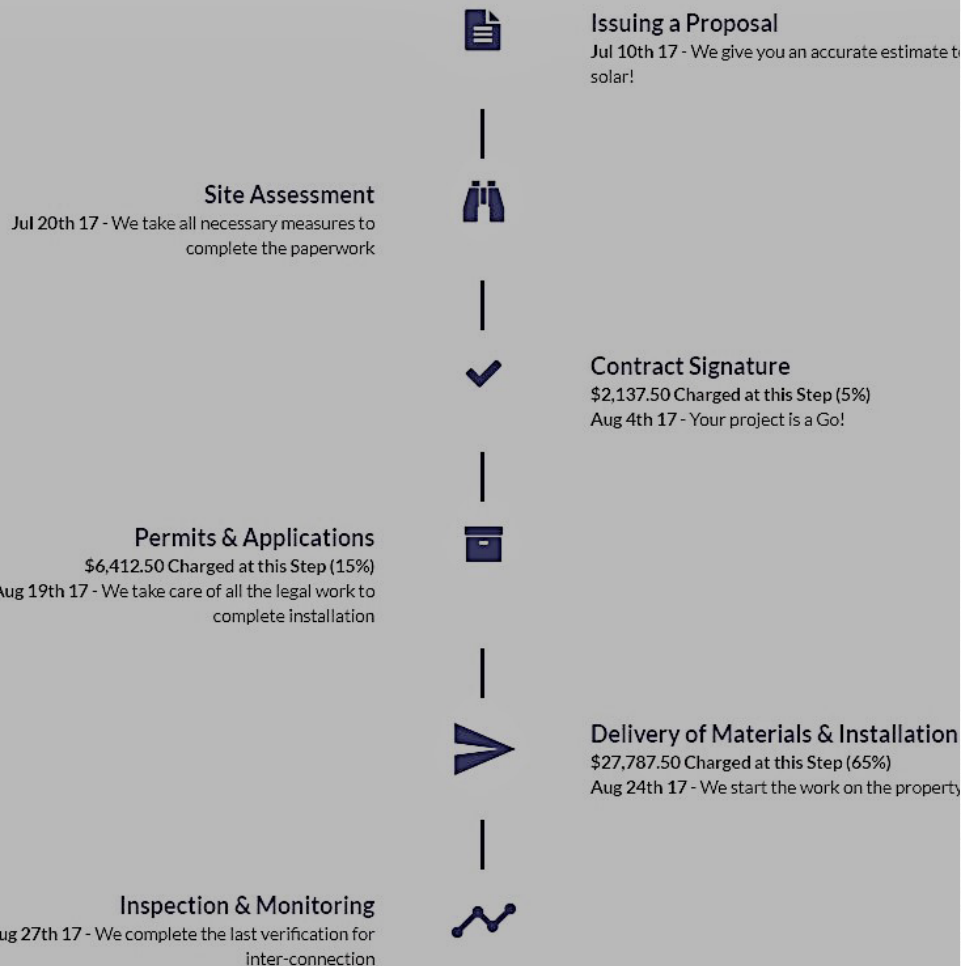


Don't pay for a full-time employee

No need to do them yourself

Some AHJs accept email. Some won't, but...have them ready

Needs to be compliant, quick & cheap



Follow a timeline

AND GIVE YOUR CLIENT ACCESS



Automatic Notifications



Edit if any delays / reassure clients



Save tons of project management costs



John
Paul



john
Smith the III



John
Paul



Layla
Reid



Lennie
Moreno



Steve
James

Everyone is accountable

DURING THE PROCESS



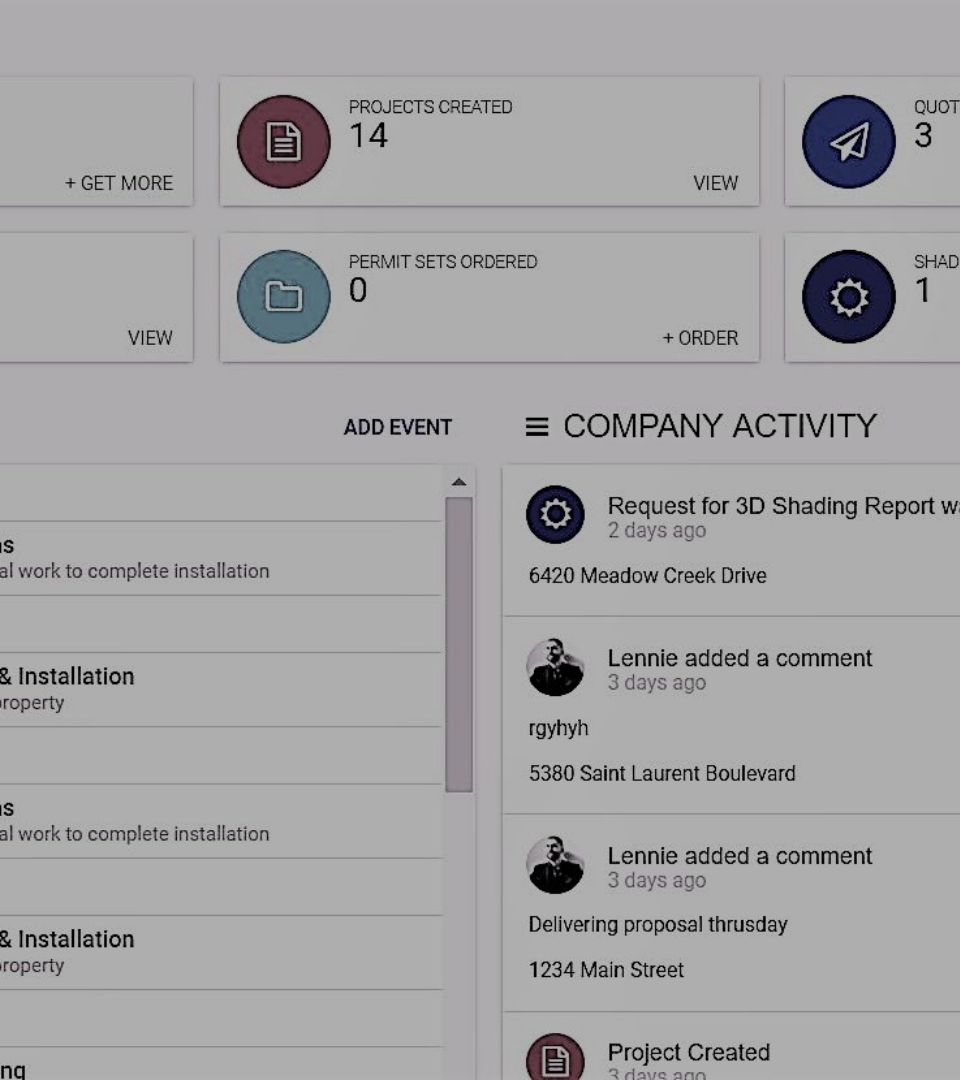
Specific Roles & Permissions



Text Message – Email Notifications



Everyone is centralized: Infinite Users



Activity Feed

TO-DO LIST & CALENDAR



Have an overview of your productivity



Check your team's productivity



Check the latest activity



SOLARGRAF

If you want to keep up with competition...

WHITE-LABEL SOLUTIONS



Manufacturers



Lenders



Utilities



Distributors



SOLARGRAF

What our Enterprise clients get with

WHITE-LABEL SOLUTIONS



Loyalty



Brand recognition



Market data



Single Sign On & much more...

Some of the partners we work with



Moving forward

PATTERNS NEEDS TO BE ADJUSTED



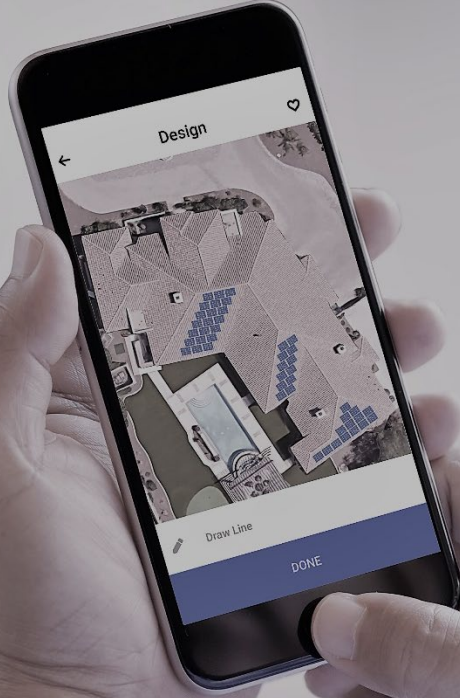
Remote tools grew exponentially



Small readjustment period = BIG WIN



The entire industry is moving towards technology for a reason...



HERE'S A QUICK DEMO

[HTTPS://SOFDESK.WISTIA.COM/MEDIAS/9H1YZB2IXA](https://sofdesk.wistia.com/medias/9H1YZB2IXA)

THANK YOU!!
GO ON SOLARGRAF.COM TO GET STARTED