

**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**



**Eric Wesoff**

**Senior Editor | pv magazine**

**pv magazine**  
**webinars**

# How to Boost Your Solar Business in a Virtual World



**Lennie Moreno**

**Sofdesk**



**Billy Zeier**

**Clean Point Energy**

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# SOLARGRAF

## HOW TO SELL SOLAR REMOTELY

AND THRIVE IN A PERIOD OF UNCERTAINTY

pv magazine Webinar 2020

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## 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**



SOLARGRAF

## 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

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## 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 



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“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



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Being Solar Installers

**WE UNDERSTAND THE CHALLENGE...**

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**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

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**Project Cancellation**



**Unpredictable Events / Change Orders**



**Your Burn Rate = Needs Optimization**

Delays

Cashflow

Reputation



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Can we change a 90-day cycle  
**INTO A 30-DAY CYCLE**

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**Close under 5 days**



**Follow a structure of 25 days**



**Get more referrals from happy clients**



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Start with reducing your Soft Costs by

## STREAMLINING YOUR PROCESS

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**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?**



When you canvass

## & CREATE YOUR OWN LEADS



**Maps – Reverse Lookup / WP Pro**



**Create a referral program**



**Quote accurately but quickly**



**Create team quotas / objectives**



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Create a REMOTE

**ACCURATE DESIGN IN SECONDS**

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



**Calculates Automatically**



**Needs to be Compelling**

## Overview

System size

CEC-AC Rating

Estimated Solar Savings Over 20 Years

Estimated first year production

5.89 kW DC

?

5.21 kW AC

?

\$19,715.91

?

9,363 kWh AC



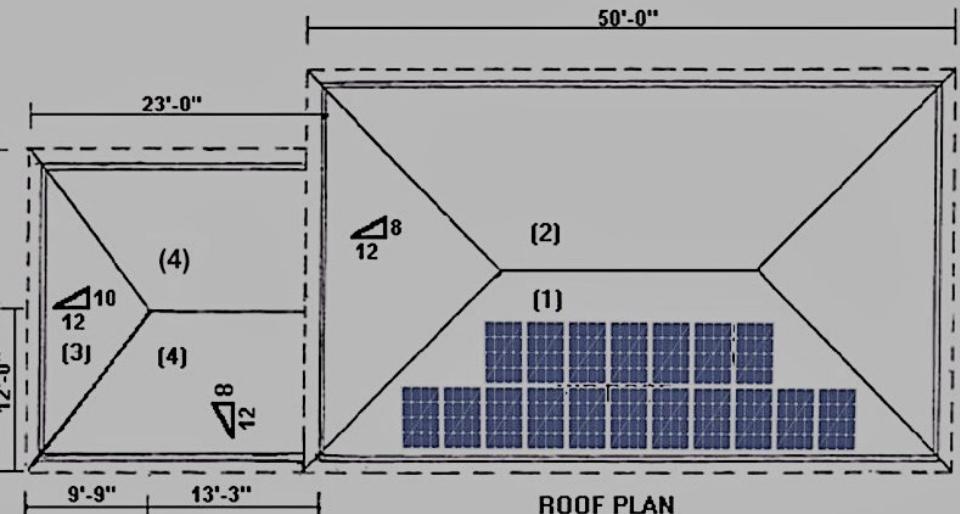
285 Trees planted



26.68 Vehicles off the road



297.85 Barrels not con



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

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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



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Create an accurate layout

## ONE CLICK SHADING VALUES

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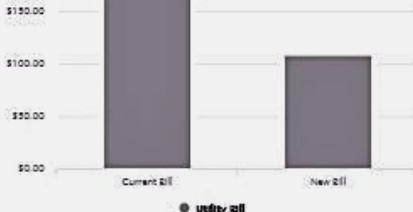
Compliant



Calculates all surfaces automatically



Can be shown to clients  
remotely in real time



## Overview

System size

3.47 kWDC

Estimated Solar Savings Over 25 Years

\$55,173.54

Estimated first year production

5,442 kWh AC



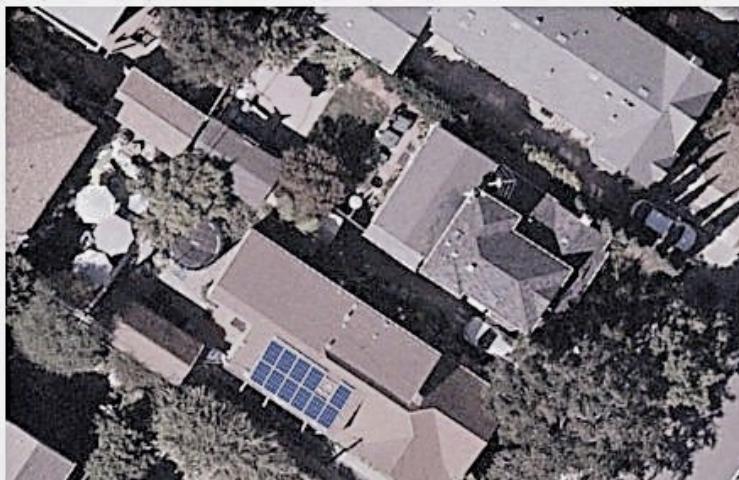
2,364 Trees planted



19.20 Vehicles off the road



214.37 Barrels not consumed



# SOLARGRAF

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 Period: 11.2 years  
Estimated 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: \$28,453  
Estimated Solar Savings Over 25 Years: \$51,120  
Net System Cost: \$21,120  
Estimated Net Savings: \$30,000

**SELECTED**

Loan Options

10 Year

Loan Amount \*: **\$30,535.45**

Interest Rate: **2.99%**

Loan Term: **10 years**

Loan Payments: **\$206.30 / Month**

Estimated New Utility Bill: **\$108.26 / Month**

Estimated New Monthly Bill: **\$314.56 / Month**

Exact 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**



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Want to sell “adders” or  
**ENERGY EFFICIENCY PRODUCTS?**

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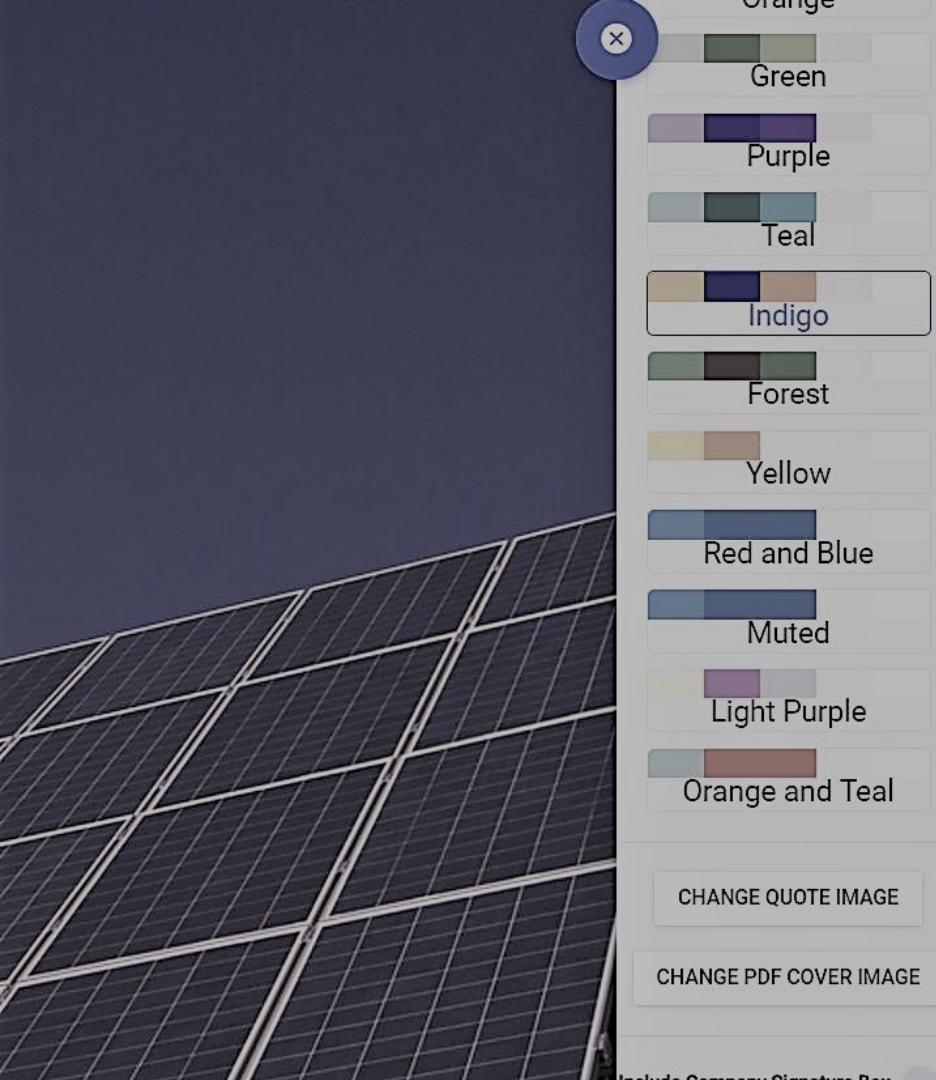
**Do it in real-time**



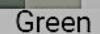
**Have them ready in your adders**



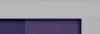
**Will show savings on your quote!**



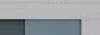
Orange



Green



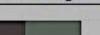
Purple



Teal



Indigo



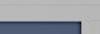
Forest



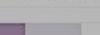
Yellow



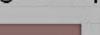
Red and Blue



Muted



Light Purple



Orange and Teal



CHANGE QUOTE IMAGE

CHANGE PDF COVER IMAGE

Include Company Signature Box

SOLARGRAF

Make sure it's tailored

**FOR YOUR COMPANY & POLICIES**



**Style, Sections, & Presentation**



**Pricing & Materials**



**Process, Terms & User Access**



## East Pershing Avenue

6116 East Pershing Avenue, Scottsdale, Arizona, United States

### Manage Your Notifications

- Receive SMS Notification
- Receive Email Notification
- General Information
- Pricing
- Materials
- Utility Settings
- Financial Options
- Project Timeline
- Manage Incentives
- Assign Users

July 6th 2017

System

Proposal Sent to Client.

12:08 pm

SEND



# SOLARGRAF

Every Project is 1 Page

## & YOU CAN DO VIRTUAL SITE SURVEYS



Add notes / comments



Take pics / Upload Files /



Change anything in real-time

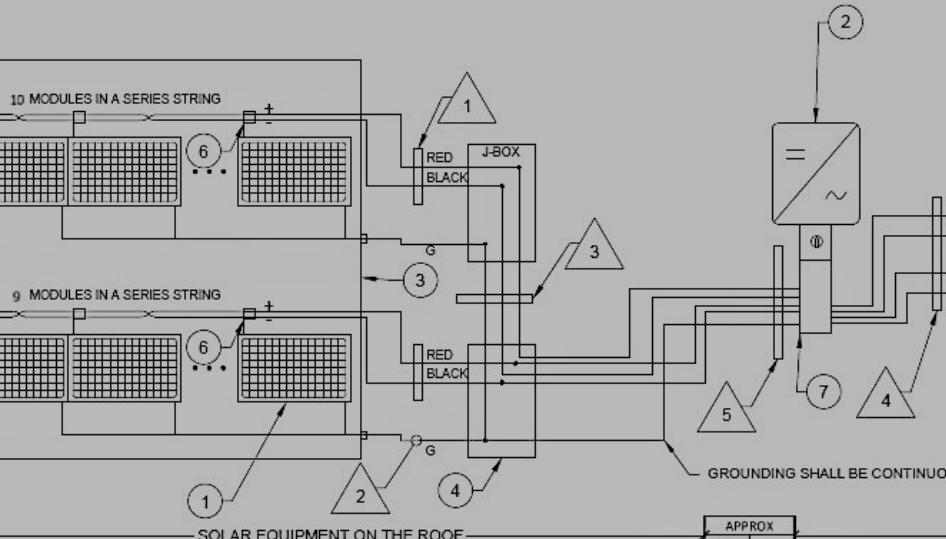


Make your team accountable

WATER PIPING LOCATED NOT  
5 FEET FROM THE POINT OF  
TO THE BUILDING SHALL BE  
NOT BE USED AS A CONDUCTOR TO  
ECT ELECTRODES THAT ARE PART  
UNDING ELECTRODE SYSTEM PER  
(1)

NOTE: SPLICING OF THE WIRE-TYPE  
GROUNDING ELECTRODE SHALL BE  
PERMITTED ONLY BY IRREVERSIBLE  
COMPRESSION-TYPE CONNECTORS LISTED AS  
GROUNDING AND BONDING EQUIPMENT OR BY  
THE EXOTHERMIC WELDING PROCESS PER  
CEC 250.64(C)(1).

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



ULE	NOTES
NUMBER	QUANTITY (19)
US (240V)	QUANTITY (1); INTEGRATED AFCI
SEE RACKING DETAILS	
CANTEX	
RAPID SHUTOFF COMPLIANT	
ED IN INVERTER	INTEGRATED AFCI
240V, 30A, 2P, 3R	

CONDUIT AND CONDUCTOR SCHEDULE (PER CEC 690.8(B) AND TABLE 310.15(B))			
TAG	DESCRIPTION OF CONDUCTOR TYPE	CONDUCTOR SIZE	# OF CONDUCTORS
1	VENDOR CABLE	#12	2
2	EGC/GECC	#6	1
3	THWN-2	#10 & #6	2 & (1)G
4	THWN-2	#10	3 & (1)G
5	THWN-2	#10	4 & (1)G

CONDUCTOR CALCULATIONS:

3) Max Optimizer DC Output: 15a  
15a x 1 = 15a\*  
15a / (0.71 x 1) = 21.13a  
#10AWG = 30a

4) Inverter AC Output: 16a  
16a x 1.25 = 20a  
16a / 0.81 = 19.51a  
#10AWG = 30a

5) Max Opti  
15a x 1 =  
15a / 0.7 =  
#10AWG = 30a

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Save time on your management

## 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



### Issuing a Proposal

Jul 10th 17 - We give you an accurate estimate to solar!



### Site Assessment

Jul 20th 17 - We take all necessary measures to complete the paperwork



### Contract Signature

\$2,137.50 Charged at this Step (5%)  
Aug 4th 17 - Your project is a Go!



### Permits & Applications

\$6,412.50 Charged at this Step (15%)  
Aug 19th 17 - We take care of all the legal work to complete installation



### Delivery of Materials & Installation

\$27,787.50 Charged at this Step (65%)  
Aug 24th 17 - We start the work on the property



### Inspection & Monitoring

Aug 27th 17 - We complete the last verification for inter-connection

# SOLARGRAF

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

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**Specific Roles & Permissions**



**Text Message – Email Notifications**



**Everyone is centralized: Infinite Users**

PROJECTS CREATED 14 [VIEW](#)

PERMIT SETS ORDERED 0 [+ ORDER](#)

[VIEW](#)

[+ GET MORE](#)

[ADD EVENT](#)

**COMPANY ACTIVITY**

-  Request for 3D Shading Report w  
2 days ago  
6420 Meadow Creek Drive
-  Lennie added a comment  
3 days ago  
rgyhyh  
5380 Saint Laurent Boulevard
-  Lennie added a comment  
3 days ago  
Delivering proposal thursday  
1234 Main Street
-  Project Created  
3 days ago

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## Activity Feed

## TO-DO LIST & CALENDAR

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 **Have an overview of your productivity**

 **Check your team's productivity**

 **Check the latest activity**



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If you want to keep up with competition...

## WHITE-LABEL SOLUTIONS

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**Manufacturers**



**Lenders**



**Utilities**



**Distributors**



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What our Enterprise clients get with

## WHITE-LABEL SOLUTIONS

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**Loyalty**



**Brand recognition**



**Market data**



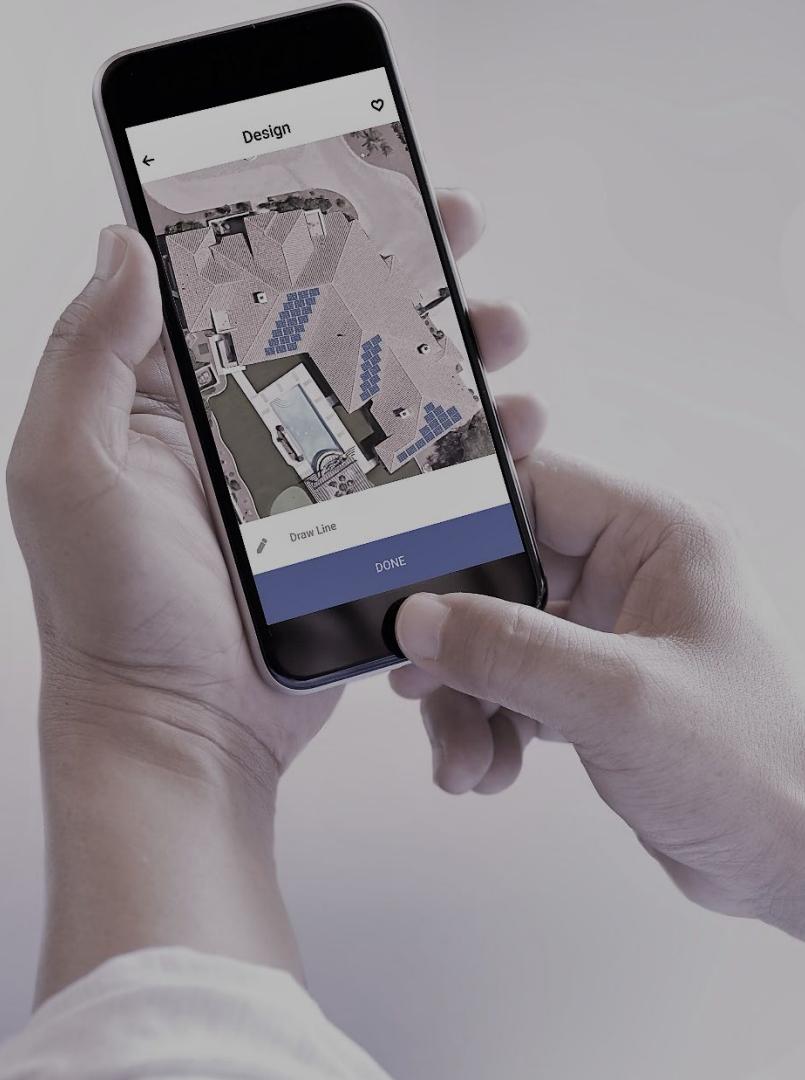
**Single Sign On & much more...**

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...**

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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**