

**THE  
SOLAR SALES PLAYBOOK  
FOR PROPOSALS THAT CLOSE**



**aurora**

# INTRODUCTION

Solar is the energy source of the future, and if you're reading this, you're lucky enough to stand on the horizon about to watch the sunrise. [The global solar market grew by 26 percent in 2017](#), with 99 gigawatts of grid-connected PV capacity installed.

The International Energy Agency reports that “Renewables will have the fastest growth in the electricity sector, providing almost 30% of power demand in 2023, up from 24% in 2017. During this period, renewables are forecast to meet more than 70% of global electricity generation growth, led by [solar PV](#) and followed by wind, hydropower, and bioenergy.”

It's quite clear, as Bloomberg New Energy Finance's Michael Liebreich declared, “[this is not alternative energy. This is just mainstream, power-generating technology.](#)”

This is great news for you, a pioneer in bringing clean solar energy to as many households and businesses as possible. We appreciate the hard work you're doing and we want to see you succeed.

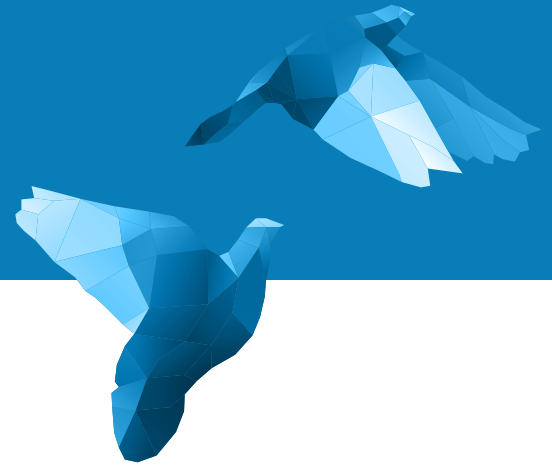
## Why This Guide?

We've created this guide to help you close more solar sales by understanding the factors that close deals. In this guide you'll find summarized insights from over a year of our own research at [Aurora Solar](#), speaking with homeowners, industry experts, and leading solar salespeople at high-growth solar companies.

**Bonus!** At the end of this guide, you'll find a checklist that lists all of the items that one could have in a solar sales proposal and why they might be important. You shouldn't include all of the items, but rather use the checklist to see if you're missing anything important that could be compelling to your customers.



# TABLE OF CONTENTS



<b>THE QUEST</b> Our Quest to Understand What Makes Proposals Succeed	<b>3</b>
<b>THE WAY</b> The 5 Key Insights for Proposals That Close	<b>5</b>
<b>1</b> Highlight What the Customer Cares About	5
▪ Emphasize the Finances of Going Solar	5
▪ Show Social Proof in Context	8
▪ Build Trust	8
<b>2</b> Have Customizable Proposals	10
<b>3</b> Differentiate Your Company	13
<b>4</b> Exude the Highest Sense of Quality & Professionalism	16
<b>5</b> Be Remarkable	17
<b>BONUS</b> Solar Proposal Checklist	<b>20</b>

# THE QUEST

Our Quest to Understand What Makes Proposals Succeed



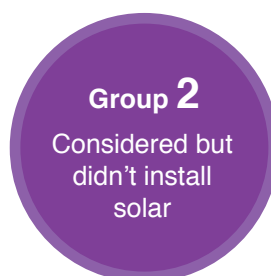
Here at Aurora, our goal is to empower solar companies to succeed. We want to do this by helping you design and sell better solar (and more of it).

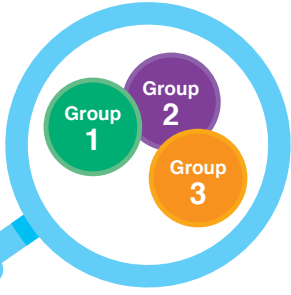
If we take a step back, and look at the top goals of solar installers for 2018, “improving sales closing rates” is second on the list after “increasing leads” (Third is speeding up processes.)

So we decided to figure out how to help installers achieve this goal by doing research into what makes a proposal so strong that it has a higher chance of closing a potential customer.

The first thing we did is hire an expert. We brought on Katherine Glass who is a consumer research and marketing expert who has helped brands like Starbucks, Delta and Petco figure out how to bring the best experiences to their customers.

Next, with Katherine’s help, we interviewed homeowners around the country interested in solar, at different points in the sales process:





**It was helpful to have these different perspectives:**  
 “What persuaded people to install solar or not?  
 What were the positive parts of the experience?  
 The negative?”

We then convened a roundtable session of seasoned solar professionals at our office to integrate insights from their sales experiences.

Katherine facilitated the session and identified common themes and lessons about what makes proposals successful from the contractor perspective.

This dynamic day yielded rich information on the key elements of compelling proposals, and kicked off six months of work by our

team to enhance Aurora’s proposal templates so solar salespeople could have the best proposals in the industry. We hired designers to develop new proposal templates for Aurora based on our research findings, and our internal team worked to build additional functionality to make our proposal tool as user-friendly as possible.

Overall, our research led us to 5 key insights that make a solar proposal close. Today, we’re excited to share what we’ve learned with you!



Some of the participants of Aurora’s roundtable workshop on solar sales proposals (from left to right):

- **Zayith Pinto**  
Residential Sales Manager at Sunworks Inc.
- **Ty Simpson**  
Regional Sales Manager of Bland Solar and Air.
- **Michelle Meier**  
Director of Solar Services at BSW Roofing & Solar, and President at Solar Roof Services LLC.

- **Vernon Stratton**  
CEO of Polar Solar.
- **Katherine Glass** (facilitated the workshop)  
Consumer research and marketing expert.

(Participant **Michael Hale**, Solar Energy Consultant at Baker Electric Solar is not pictured.)

# THE WAY

The 5 Key Insights for Proposals That Close



## 1 Highlight What the Customer Cares About

If you want to engage prospective customers and convince them of the value your company will provide, naturally your proposal should focus on the information that's most important to them. But what is that? While each customer is unique, some key themes emerged from our research:

### ■ Emphasize the Finances of Going Solar

Although many homeowners cited environmental concerns as a motivator for considering solar, in the end, for most, financial savings were the biggest deciding factor.

As part of this, the availability of rebates/incentives was also a key consideration. Many homeowners found the incentives for solar confusing, so they appreciated when a company could help them make sense of their options.

This perspective was corroborated by the experiences of the solar professionals that participated in our roundtable.

“The number one thing to discuss is financing,” reflected Ty Simpson, Regional Sales Manager of Bland Solar.

“It’s hard for customers to find financing details on the internet... They trust you to know that stuff. That’s the biggest gray area.”

“

It’s hard for customers to find financing details on the internet...

They trust you to know that stuff. That’s the biggest gray area.

”

# HOW MUCH WILL YOU SAVE WITH SOLAR?



# \$52,816

How much you'll save on energy in 25 years <sup>1</sup>



## With solar

# \$215

Monthly utility bill

# \$230

Bill in 25 years



## Without solar

# \$230

Monthly utility bill

# \$678

Bill in 25 years

<sup>1</sup> Estimated net savings assume no discounting of cashflows

# REBATES AND INCENTIVES



## \$10,500

Amount you can save off your system cost from incentives



### Federal Incentives

## \$14,350

(30% of a \$20,500 system)

### Local Incentives

## \$5,500

#### Receive a credit on your system

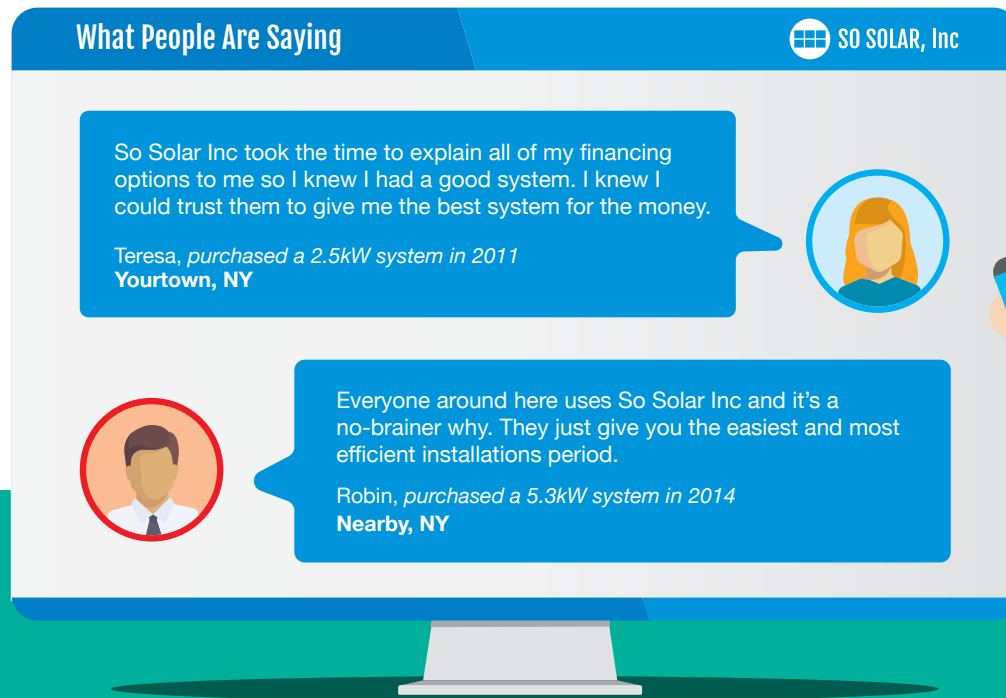
The 30% federal ITC starts to phase out after Dec 31, 2019. Get solar now to take advantage of these discounts.

The financial impacts of your customer's solar installation, such as immediate and lifetime savings, as well as financial incentives that apply to them, are some of the most important elements for your proposal to address.



## ■ Show Social Proof in Context

Customers care about reviews, testimonials, and referrals from people they trust such as a neighbor or friend. Focus on highlighting relevant reviews in your proposal by location proximity, for example.



Customer testimonials and other indicators of the quality of service your company provides are critical elements of a strong solar sales proposal.

*(In this example we show the customer testimonials of a fictional solar company, So Solar Inc.)*

## ■ Build Trust

Customers want to know they can count on you and your company. Solar is a big decision about something most homeowners don't know a lot about, so they need to trust that you, your company, and the product you're selling them will be around for the long term.

This is all the more essential given that a common industry challenge identified by our roundtable attendees was the difficulty in overcoming skepticism and distrust from customers who have had bad experiences with solar companies that did not live up to the quality they promised (or who have heard similar stories from friends and family).

*"The [biggest challenge is the] misconception people have of the solar industry. That we're just out to get a dime, to get a tax credit. Maybe they had a bad experience with a company that tried to rip them off. They feel that solar companies are car salesmen."* said Zayith Pinto.

Be a teacher and not a salesperson and you will win the trust of your customers.

*Favorite thing about working in solar:*

“



Solar is not sales, it's education.  
You're teaching something unorthodox,  
getting people to that a-ha moment.

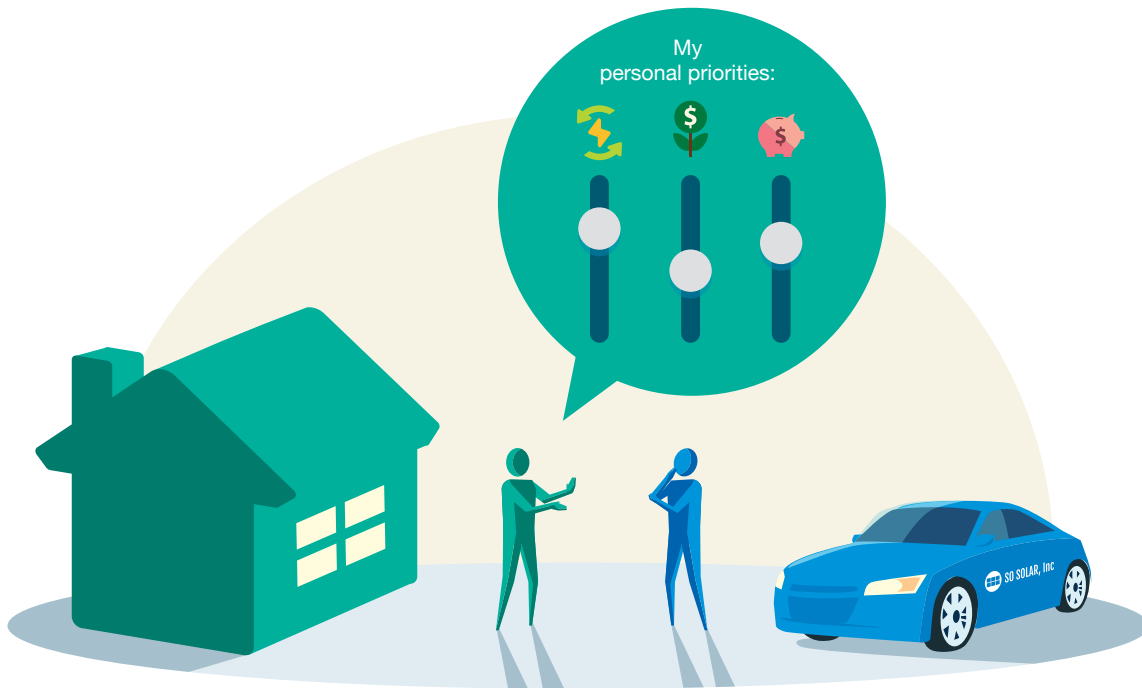
**Ty Simpson**

*Regional Sales Manager of Bland Solar and Air.*

”

## 2 Have Customizable Proposals

In addition to highlighting the common factors that most solar customers care about, a great proposal is one that is tailored to the individual. As you engage in conversations with the customer, they're likely to offer insights into their personal priorities.



Roundtable participants recognized some common categories of customers, and reported that identifying where the customer fits makes it easier to tailor proposal content effectively. For instance, some customers are primarily focused on immediate savings, while others care more about maximizing the lifetime ROI of their system.

Some customers are particularly focused on the technologies that will be used in their systems, while others are most interested in the financing mechanisms.

Not only will these factors influence the system design and financing options you may propose, but they should also inform what is emphasized in your proposal.



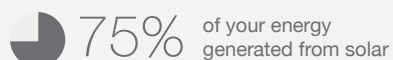
## Your System



### Overview

System Size	11.20 kW
System cost	\$28,570
Year 1 Production	15,735 kWh
Year 1 Savings	\$2,241

### Statistics



### Components (Your installation uses the latest in solar technology)

**Solar panels**  
SamplePanel X9000

**Inverters**  
InverterExample T700



The information you include in your proposal should address the priorities your customer has expressed throughout your conversations. For instance, if they are particularly interested in the aesthetics of the design, you might want to devote more space to showing how the installation will look, or if they are focused on the components you'll use you can emphasize why you chose particular makes and models.

Finally, just as the proposal shouldn't be one-size-fits-all for the customer, it should also be customizable enough to be able to meet the diverse styles and experience levels of different sales staff.

We learned that a new solar salesperson will need a longer and more detailed proposal to answer any and all questions a homeowner might have, whereas an experienced solar pro might need a 1-3 page proposal and can answer any detailed questions by memory. Once again, the proposal should be flexible enough to work for both.

*Favorite thing about working in solar:*

“



Being on the cutting edge of a major shift in how the world uses energy. Someday we will be able to look back and say we were a part of something special.

**Michael Hale**

*Solar Energy Consultant Baker Electric Solar.*

”



### 3 Differentiate Your Company

Another essential feature of a strong sales proposal is that it clearly communicates what sets your company apart from the competition. On the surface, to customers, many solar companies look the same. So what sets yours apart?



Is it your experience and longevity in the industry? Is it that you have a background in roofing and understand how not to damage the roof? Is it that you have flawless reviews? Do you offer something (such as an extended warranty) that no one else offers? Do you use [accurate 3D solar software](#) which gives reliable estimates?

Whatever defines your company's value should be clearly articulated in your proposal so the customer doesn't have to read between the lines.

This was a major theme among the participants in our roundtable. Michael Hale, Solar Energy Consultant at [Baker Electric Solar](#), explained how his company emphasizes their decades of experience and the reputation for

quality. "We differentiate with our installations method, the experience of our crew, [and] the longevity of our company."

Twice ranked #1 solar electrical subcontractor in Solar Power World's Top 500 Solar Contractors list, and #4 on the Rooftop Solar Contractors list, the strategy seems to be paying off for Baker Electric Solar.



We differentiate with our installations method, the experience of our crew, [and] the longevity of our company.



### We believe in quality

All of our installers have a minimum of three years of experience in the industry, and our installations are backed by workmanship and production guarantees (see P. 5 for details). Our commitment to excellence is the reason why most of our work comes from referrals from satisfied customers.

### We're a local company

With So Solar, Inc. you're not just a number, you're a neighbour. Founded right here in YourTown, we're committed to giving back to the community. We even designed and installed the solar project on City Hall last year.

### We use the most advanced modeling software in the industry to create your estimates

Not all numbers are created equal. Your system proposal was carefully modeled on the Aurora platform, which conducts the most accurate performance simulations in the industry. The performance numbers we offer are what you can actually expect to get from your system.



Content that clearly communicates the unique value your company offers should have a central place in your solar sales proposals.

*(In this example we show the value proposition of a fictional solar company, So Solar Inc.)*

For Michelle Meier, whose company Solar Roof Services LLC helps roofers add solar installations to the suite of services they offer, the approach is a bit different.

“**[In] every proposal, the second page is all about the roofer and their value-add.**” Installers that work with Meier emphasize how the customer can be more confident that the installation won't cause roof damage if they go with a roofing professional.

Additionally, “With the roofers, since the homeowner may not have even been thinking about solar, we're educating on solar 101.”

The technology you use in your designs, or in the process of creating them, can also be a factor that differentiates your company.

This is an approach taken by Vernon Stratton, CEO of Polar Solar; “**I had to find a product that was a bit different so someone can't come behind me and offer the same.**”

For Ty Simpson, Regional Sales Manager of Bland Solar, Aurora's independently-verified design functionality helps communicate their company's value. “**Our company and the customers we have love Aurora. Even the customers (they don't know the program) love it. They see the 3D model of their home, they see the shading of their tree. I love that Aurora has given the industry credibility. People used to give a number on a piece of paper, no backing.**”

*Favorite thing about working in solar:*

“

Helping people save money.

**Michelle Meier**

*Director of Solar Services at BSW Roofing & Solar,  
and President at Solar Roof Services LLC.*

”







## 4 Exude the Highest Sense of Quality & Professionalism

Given that a solar installation is a big investment that will be with the home for decades, it should be obvious that the quality and reliability of your installations should be a central focus of your proposal (and of course your day-to-day operations).

I like to tell installers to think of their companies as a prized pie in a pie bake-off. The pie will be judged not only on taste, but many other factors such as presentation, texture, your story about the pie, and how it compares to the other pies in the contest.

Similarly, you, your company and the proposal you leave behind will be judged

on many factors—make sure to go through every touchpoint of your experience and see if you can take it to the next level.

This means that content that communicates your company’s commitment to excellence should have a central place in your proposals.

This could include testimonials from past clients, snapshots of your strong reviews and ratings on third-party sites like Google and Yelp, awards and other recognition you’ve received, or guarantees you offer.



Using cutting-edge tools like Aurora, that allow you to provide verified numbers is another way give customers confidence in the information you’re presenting.

“Aurora allows us to not mislead... and to really stay [true] to the core value of our company: taking care of our customers.” says Zayith Pinto.

Aurora also helps Bland Solar address this challenge, according to Ty Simpson.

“[Our approach is] full disclosure, full transparency. I’ll show them how we draw trees in Aurora, show them the designs and reports, show NREL’s numbers and compare them to Aurora’s—[we] show numbers across the board.”

## Be Remarkable

A great proposal is one that is visually appealing and different enough that it will be memorable. Most proposals we saw were not well designed. There's no sense of style, color scheme, typography, nor personality. Good design is something that can make your proposals remarkable and stand out.

We took this to heart when we developed Aurora's proposal templates, commissioning professional designers to create templates that were more visually impactful:



Beyond the look of your proposal, there are a lot of strategies you can implement to ensure that the information in your proposal sticks in people's minds.

The book **Contagious: Why Things Catch On** by Wharton marketing professor Jonah Berger—a New York Times bestseller and Best Marketing Book of 2014—explores the factors that make content go viral. While people probably won't be sharing your proposal on Facebook, applying Berger's insights on how to make something “remarkable” can increase the likelihood that they remember your proposal and want to talk about it.

In Berger's words:

**“Something can be remarkable because it is novel, surprising, extreme, or just plain interesting.”**

You might think that a product or service needs to be completely new or rare to be remarkable, but remarkability can be found in even the most common product. Snapple added remarkability to their drinks when they came up with the idea of including surprising facts on the inside of their bottle caps.

Think about what potential customers would find surprising, interesting, impressive or otherwise noteworthy about your company, your approach, or your design.

Maybe it's the unusual story of how your company was founded, the inspiring tale of how one of your past projects had a transformative impact on a family or community, or the cutting-edge components you used in the design. Or maybe it's the realistic model of how their house will look with solar, that you created in Aurora!

*Favorite thing about working in solar:*

“



To be able to go to a home and say we're literally giving you \$200,000 to send your kids to school, to pay off your mortgage, to retire-that's a huge impact.

**Zayith Pinto**

*Residential Sales Manager at Sunworks Inc.*

”

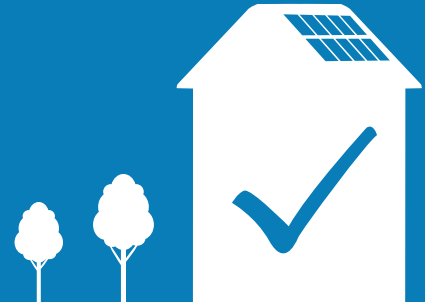
As the solar industry grows increasingly competitive, contractors need to think about how they can better communicate their value to potential customers.

In addition to ensuring that your customers have an excellent experience with their installations (the best way to ensure positive word of mouth and customer referrals), incorporating these five insights into your proposals can help make them more successful. This way, when your conversations with a homeowner conclude, you can be confident that the proposal in their hand will stick in their mind.



Bonus!

# Solar Sales Proposal Checklist



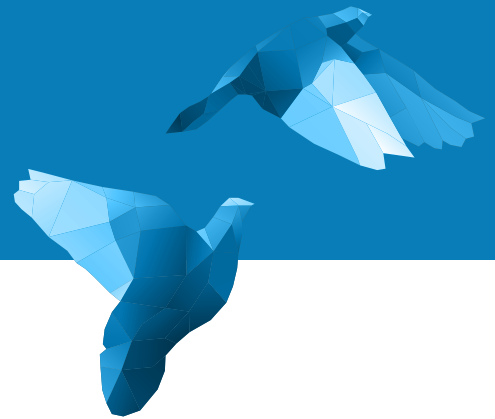
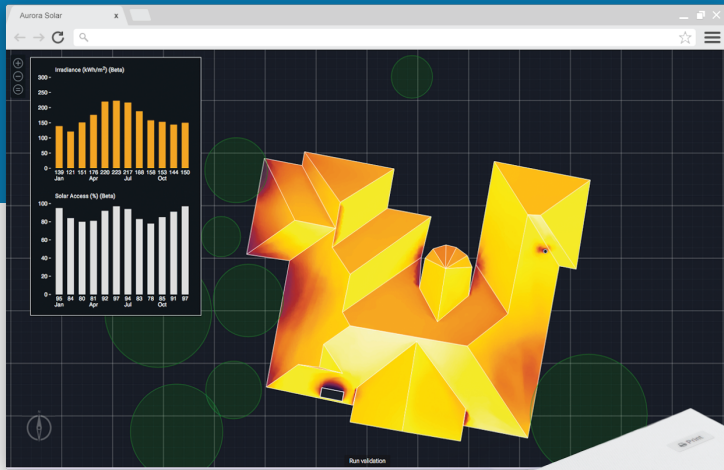
This checklist lists many of the items that one could have in a solar sales proposal and why they might be important. You shouldn't include all of the items, but rather use the checklist to see if you're missing anything important that could be compelling to your customers.

- A cover page** — a well designed cover can set you apart from the competition and increase your professionalism.
- Client's address, name and other contact information** — to make it personalized.
- Your company's name, address and other contact information** — so the client can easily contact you if needed.
- Any assumptions or disclaimers** — it is important to let the client know what assumptions you used as well as any legal disclaimers to protect your company. These could be items such as the annual utility escalation % used, estimated annual utility bill, discount rate for future cash flows, as well as legal language such as "this estimate is non-binding" for which you should consult a legal professional.
- About you/your company** — use this page to connect with the customer and tell them why you and your company are special, trustworthy, professional, etc...
- System summary** — one concise page with the most important information helps the customer focus and refer to important information easily. This page could include things like savings, system size, cost, offset numbers, images of their property with panels, and components.
- Components** — to highlight the amazing technology behind the components such as modules, inverters, storage, etc... that the client might be getting from you.
- Freebies** — to compel the client to work with you in order to get a freebie (such as a Nest thermostat) or other bonus
- The cost of not getting solar** — to show them the cost of doing nothing and that electricity rates do rise.

- Savings** — to emphasize their savings even more. This is the most important factor for most decision makers so any way you can amplify this idea - do it!
- Financing option comparisons** — it is good to show an apples to apples comparison of the financing options that you've offered to your client. This way they can easily choose which option makes the most sense for them and see important factors such as savings, monthly payments, interest, upfront costs and break-even period.
- Charts and graphs** — including impactful charts and graphs that easily help the client understand savings are good. Including too many charts and graphs however could confuse the client and might be overwhelming. (Unless they love data!)
- Rebates and incentives** — including information about rebates and incentives and explaining that these incentives may not last forever could push clients over the edge and get them to sign.
- Referral bonuses** — to compel the client to refer friends for a monetary (or other) referral bonus
- Warranty and insurance** — if offered, it could set you apart from the competition.
- Testimonials** — happy customers saying positive things about you and your business always make a good impression
- Home value increase** — there are a few [studies that show that solar panels can increase the value of your home by 20%](#).
- Environmental benefits** — to show the feel-good and social impact of switching to solar. It helps to show benefits that are easy to understand such as "Taking 90 cars off the road per year".
- FAQs** — to answer any frequently asked questions that are popular with clients from the past. This could show your experience and that you care about the client's questions or concerns.
- Next steps / Process** — to explain the process from proposal to installation since many customers are new to the solar buying process.

Aurora's solar sales and design software automatically takes into account everything you've just learned to help you create winning quotes and proposals for your solar customers.

See how to design and sell better solar with Aurora 



**aurora**

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