

# Helio Solar, LLC

A clean energy company that provides solar power solutions for families through in-house engineering, procurement, and construction services.



**HELIO SOLAR**  
SAFE. SIMPLE. SUSTAINABLE.

# Welcome to Helio

## **We self-perform all installations**

We don't outsource any part of the solar installation process. Our in-house team handles everything from design to construction to ensure quality and accountability.

## **We lead with integrity**

Honesty, transparency, and ethical sales practices are the foundation of our business. We're here to build relationships, not just make sales.

## **We protect homeowners**

Our high-quality materials, workmanship warranties, and customer-centric approach ensure that our clients are always taken care of, even long after the installation is complete.

## **We build relationships that last years**

We're not just here for a quick sale. We're committed to being a trusted partner for our clients, providing them with reliable clean energy solutions for decades to come.

## **We do things the right way, even when it costs more**

At Helio, we prioritize quality and integrity over profits. We're willing to invest more to deliver the best possible experience for our customers.

# Our Identity



## Engineering, Procurement, Construction

Helio Solar is a full-service EPC (Engineering, Procurement, Construction) company, handling every aspect of the solar installation process in-house.



## No Subcontractors-3 E1's On Staff

Helio Solar does not rely on subcontractors or take any shortcuts, ensuring high-quality work and a streamlined customer experience.



## Values-Driven

Helio Solar is a values-driven company that prioritizes integrity, transparency, and customer satisfaction over sales-driven tactics.

Helio Solar's identity is defined by its commitment to excellence, in-house expertise, and a values-driven approach that sets it apart from traditional solar companies.

# Our Mission

At Helio Solar, our mission is to empower families with clean energy through craftsmanship, transparency, and trust. We don't just install solar panels - we build legacy-level systems that families can rely on for decades, helping them reduce their carbon footprint and take control of their energy future.



# Our Core Values

1

## Stewardship

Responsible management of Helio's resources and the environment

2

## Honesty

Transparent and truthful communication with customers and colleagues

3

## Discipline

Commitment to consistent processes and standards of excellence

4

## Respect

Treating all individuals with dignity, empathy, and professionalism

5

## Excellence

Delivering exceptional products, services, and customer experiences

6

## Accountability

Owning our actions and taking responsibility for their consequences

7

## Humility

Remaining teachable, coachable, and open to feedback and improvement

# Your Commitment

**We don't need perfect reps.**

We need:

## **Consistent reps**

Reps who show up and work hard every day.

## **Honest reps**

Reps who tell the truth and put customers first.

## **Coachable reps**

Reps who are open to feedback and eager to improve.

## **Professional reps**

Reps who embody Helio's values and brand.

## **Reps who care about homeowners**

Reps who are genuinely invested in the customer experience.

# What Makes Helio Different

- **Do not use pressure tactics**

Helio Solar avoids high-pressure sales tactics and instead focuses on building long-term relationships with homeowners.

- **Do not overpromise savings**

Helio Solar provides realistic estimates of energy savings and avoids making exaggerated claims about the financial benefits.

- **Do not manipulate escalators**

Helio Solar is transparent about energy rate escalators and does not try to obscure or manipulate this information.

- **Do not outsource installations**

Helio Solar self-performs all installations, ensuring quality control and accountability throughout the process.

- **Do not chase hype**

Helio Solar focuses on sustainable growth and building long-lasting relationships, rather than chasing short-term trends or hype.

# Why Homeowners Choose Us



## Realistic Savings Projections

We show homeowners accurate, transparent savings estimates based on their utility bills and energy needs, not inflated promises.



## Fast, Safe Installations

Our in-house crews complete installations efficiently and safely, minimizing disruption to the homeowner's property and daily life.



## High-Quality Materials

We use top-tier solar panels, inverters, and racking systems to ensure long-lasting, reliable performance for decades.



## Trustworthy and Stable

As a values-driven EPC, we have a strong reputation for integrity and long-term customer relationships, not just short-term sales.



## No Hidden Fees or Adders

Our proposals are straightforward, with no surprise costs or confusing escalator clauses that can inflate the final price.



## Robust Warranties

Our workmanship warranties, along with the manufacturers' warranties, provide homeowners with peace of mind and protection for decades.

# Professional Culture

## This is a Professional Environment

Expectations: - No "solar bro" energy - No bragging, trash-talking, or ego - No drama or gossip - No manipulation - No excuses - Respect for ops, engineering & field crews

## Disciplined, Not Chaotic

We are a disciplined company — not a chaotic sales organization. Professionalism is the standard.

## Represent Helio with Integrity

As a sales consultant, you are the face of Helio Solar. Your conduct and communication must reflect our values of honesty, respect, and excellence.

## Consistent, Coachable, Caring

We're looking for reps who show up consistently, stay coachable, and genuinely care about the homeowners they serve.



## The Helio Standard

At Helio Solar, we hold ourselves to the highest standards of accuracy, ethics, and professionalism. This is the foundation that underpins our work and how we interact with homeowners. Our sales consultants are expected to follow the Helio process diligently, provide honest and transparent information, and represent the company with the utmost integrity.

# The Helio Sales Process

## 1 Create Curiosity

Proactively engage with homeowners by knocking on doors to introduce Helio Solar and schedule appointments.

## 2 Build Rapport

Build rapport, understand the homeowner's needs and goals, and establish trust during the initial conversation.

## 3 Gather bill

Collect the homeowner's current utility bill information to accurately analyze their energy usage and potential savings.

## 4 Submit Lead & Set Appointment

Submit lead through your App and let your QEC or ES know.

## 5 Present (QEC and Above)

Professionally present the solar proposal to the homeowner, educating them on the system design, financial details, and the Helio Solar difference.

## 6 Educate, not pressure (QEC and Above)

Provide a consultative approach, focusing on educating the homeowner and helping them make an informed decision, rather than using high-pressure tactics.

## 7 Close ethically (QEC and Above)

Invite the homeowner to move forward with Helio Solar's services, while maintaining the highest ethical standards and avoiding any misleading claims.

## 8 Submit post-sale package (QEC and Above)

Gather all necessary documentation and information, including the signed contract, utility bill, and Aurora proposal, and submit the complete package for processing.

## 9 Follow-up (QEC and Above)

Maintain communication with the homeowner, answer any additional questions, and ensure a smooth transition to the operations team.

## 10 Hand off to Ops (QEC and Above)

Seamlessly transfer the customer's information and project details to the Helio Solar operations team for the next steps in the installation process.

# Compliance Basics

- **Utility disclosure rules**  
Follow all local utility requirements for solar disclosures and paperwork
- **State solar regulations**  
Adhere to all state-specific solar installation and permitting laws
- **Lending rules**  
Comply with financing and lending regulations for solar customers
- **TCPA texting laws**  
Follow Telephone Consumer Protection Act guidelines for customer communication
- **Helio's ethics policy**  
Uphold Helio's code of conduct and commitment to honesty and integrity
- **Aurora accuracy standards**  
Ensure all proposals and system designs meet Helio's compliance benchmarks

# What NOT to Say

- **Never say: "Free solar"**

Avoid making misleading claims about the cost of solar systems.

- **Never say: "Guaranteed savings"**

Refrain from promising unrealistic or guaranteed savings, as actual savings can vary.

- **Never say: "The state pays for it"**

Do not misrepresent the financial responsibility of the homeowner for the solar system.

- **Never say: "You'll never pay an electric bill again"**

Avoid making absolute claims about eliminating electric bills, as homeowners may still have some utility costs.

- **Never say: "You must sign today"**

Do not use high-pressure tactics or create a false sense of urgency to make a sale.

- **Never say anything misleading about incentives or escalators**

Be transparent and accurate when discussing solar incentives and any potential rate increases over time.

# What We EXPECT You to Say

- **"Let me show you exactly how this works."**  
Provide a clear, step-by-step explanation of the solar installation process and how it will benefit the homeowner.
- **"Your savings will vary year to year — here's the realistic range."**  
Set accurate expectations about the potential energy savings, avoiding unrealistic claims or guarantees.
- **"Let's walk through the assumptions."**  
Review the key financial assumptions and projections with the homeowner, ensuring transparency.
- **"Here are both options so you can compare."**  
Present multiple financing options, allowing the homeowner to make an informed decision.
- **"Let me show you where the system will really produce energy."**  
Use the Aurora software to demonstrate the actual placement and performance of the solar system on the homeowner's roof.
- **"My job is to help you understand, not pressure you."**  
Reinforce the consultative approach, focusing on education and allowing the homeowner to make a decision at their own pace.

# The Path to High Income

## Daily Consistency

Showing up and putting in the work consistently day after day is the foundation for long-term success.

## Clean Aurora Work

Producing accurate, compliant, and professional proposals in Aurora builds trust with customers.

## Accurate CRM Habits

Diligently maintaining your pipeline and activities in the CRM ensures nothing falls through the cracks.

## Respectful Communication

Engaging with customers and teammates in a courteous, empathetic, and professional manner.

## Ethical Selling

Prioritizing honesty, transparency, and the customer's best interests over short-term gains.

## Caring About Homeowners

Genuinely wanting to help families access clean energy and make a positive impact in their lives.

# Final Thoughts

## **If you show up**

Show up consistently and put in the daily activity required to build a pipeline and achieve your goals.

## **If you work hard**

Demonstrate a strong work ethic, going the extra mile to educate and serve your customers.

## **If you stay coachable**

Maintain a humble, learning mindset and be open to feedback to continually improve your skills.

## **If you follow the process**

Adhere to the proven Helio sales process and best practices to ensure consistent results.

## **If you tell the truth**

Prioritize honesty and transparency in your interactions with customers, never compromising your integrity.

## **If you respect customers**

Treat every homeowner with the utmost professionalism, care, and consideration.