

SOLAR GUIDE



HELIO SOLAR
SAFE. SIMPLE. SUSTAINABLE.

DATE:
month | day | year

Customer Details

Consultant Name

Name

Phone

Email

Address

City

State

Zip Code

Discovery

Customer Responses

How long have you lived here?

1-2 Years

3-5 Years

6-9 Years

10+ Years

How long do you plan on staying?

+/- 5 Years

+/- 10 Years

Forever Home

Not Sure

How old is your roof?

1-9 Years

10-15 Years

16-20 Years

21+ Years

How important are aesthetics to you?

Not Important

Somewhat Important

Very Important

Walk-Around/Site Analysis

Notes - Comments

Meter: Discuss Net Metering

Electrical Service Panel (MPU)

Roof Condition - Orientation

Needs Analysis

Notes - Comments

Tell me what you know about solar.
Who else have you talked to?

What are you looking to achieve by
going solar:

Save Money?

Build Equity?

Energy Independence? (Protect yourself from rising utility rates)

Going Green?

**What are your biggest concerns when
going solar?**





Discovery Needs Utility Bill	Notes - Comments
Copy of your most recent electric bill	<hr/>
Tell me what you know about the recent rate increases	<hr/>
What have you been able to do to control your rates?	<hr/>
If there was a way to eliminate rate increases in the future, would that be something of interest to you?	<hr/>

Discovery Needs	Notes - Comments
Do you think you will use more or less electricity in the future?	<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid black; padding: 2px;">Less <input type="checkbox"/></div> <div style="border: 1px solid black; padding: 2px;">Same <input type="checkbox"/></div> <div style="border: 1px solid black; padding: 2px;">More <input type="checkbox"/></div> </div> <hr/>
Likelihood you will purchase an EV in the next 5-10 years?	<div style="display: flex; justify-content: space-around;"> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> </div> <hr/>
Is a hot tub or pool in your future?	<div style="display: flex; justify-content: space-around;"> Yes <input type="checkbox"/> No <input type="checkbox"/> <div style="text-align: center;"> <small>Already Have</small> Pool <input type="checkbox"/> Hot Tub <input type="checkbox"/> </div> </div> <hr/>

Discovery Backup	Notes - Comments
Have you ever lost power?	<div style="display: flex; justify-content: space-around;"> Yes <input type="checkbox"/> No <input type="checkbox"/> </div> <hr/>
What are you using now for backup?	<hr/>
What are your most important needs if you do lose power?	<hr/>

Discovery Financial	Notes - Comments
How familiar are you with the incentives available for solar and storage?	<hr/>
How do you typically pay your taxes each year?	<hr/>
Options to finance your project Cash, loan, lease, or PPA	<div style="display: flex; justify-content: space-around;"> Strong credit? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/> </div> <hr/>

Needs Analysis	Notes - Comments
How important is a warranty to you?	<hr/>
<div style="display: flex; justify-content: space-around; border: 1px solid black; padding: 5px;"> <div style="border: 1px solid black; padding: 2px;">Not Important <input type="checkbox"/></div> <div style="border: 1px solid black; padding: 2px;">Somewhat Important <input type="checkbox"/></div> <div style="border: 1px solid black; padding: 2px; background-color: #2c3e50; color: white;">Very Important <input checked="" type="checkbox"/></div> </div>	<hr/>
Other products purchased & warranty success or issues?	<hr/>
<div style="display: flex; justify-content: space-around;"> Yes <input type="checkbox"/> No <input type="checkbox"/> </div>	<hr/>

If we could, how soon, ideally, would you want your solar system installed?

Are there any questions I can answer for you?
Follow Up Appointment