



HELIO SOLAR

SAFE. SIMPLE. SUSTAINABLE.

NEW REP QUICK START GUIDE

30 · 60 · 90 Day Plan

DAYS 1–30

Warm Up Your Market

DAYS 31–60

Build Your Network

DAYS 61–90

Close & Scale

Your roadmap from first conversation to a thriving referral business.

Warm Market | 2-Sit Close | Trade Partner Network | Tabletop Events | Block Strategy | Finance

Updated: February 2026



Welcome to Helio Solar

Your network is your business. This guide shows you how to build it.

How Helio Sells — Read This Before Anything Else

Helio Solar is not a door-to-door company. We don't cold-knock strangers and pitch on the porch. We build relationships — with people we know, people who trust us, and businesses whose customers need exactly what we offer. That distinction matters because it changes how you spend every hour of every day.

Our model has four pillars that feed each other. Master all four and you will never run out of people to talk to:

Pillar	What It Is	Why It Works
Warm Market	Start with friends, family, neighbors, former colleagues, social network	People buy from people they trust first — your warm market is the fastest yes
Trade Partner Network	Roofers, pest control, heating oil companies, alarm dealers, HVAC	These pros are already in your customer's home — they're warm introductions at scale
Tabletop Events & Home Shows	Farmers markets, home shows, community fairs, employer wellness events	High-volume warm conversations; people come to you already curious about their bills
Block Strategy (Installed Homes)	After every install, work the surrounding neighborhood with a neighbor's story	The best referral is a solar system on the house next door — visible proof every day

The Helio Sales Process — 2-Sit Close

Helio uses a deliberate 2-sit close. Understanding why makes you better at it.

SIT 1 — The Discovery & Education Appointment:

- Build rapport, understand the customer's situation (bill, home, goals, concerns)
- Educate on how solar works, net metering, the rate story for their state
- Run a preliminary savings estimate — give them something concrete to think about
- Do NOT pressure close. Schedule Sit 2 before you leave.
- Leave materials, confirm the next appointment day/time in writing

SIT 2 — The Proposal & Close Appointment:

- Come prepared with a complete, accurate proposal from the proposal tool
- Present the full value stack: bill savings + SREC income + rebates + incentives
- Address any questions or concerns that came up since Sit 1
- Present financing options and help the customer select the right product
- Close the contract — sign, submit, celebrate

Why 2 sits? Customers who feel educated, not pressured, stay closed. They refer. They answer their phones after install. The 2-sit model builds the kind of customers who become your best trade partners and your biggest source of referrals.



Your Reporting Structure & First Steps

Item	Details
Your Manager	Your first call for everything — introduce yourself Day 1 and schedule a weekly 1:1
Operations	Project pipeline, utility issues, SREC enrollment, interconnection questions
Compliance Team	Licensing, contract questions, state-specific requirements
Finance Team	Loan questions, TPO structures, finance partner selection



1–30
DAYS

WARM UP YOUR MARKET

Build your list, start conversations, and master the product before Sit 1.

Your first 30 days are about two things happening simultaneously: learning the product deeply enough to educate a homeowner, and starting real conversations with your warm market. You don't need to be an expert to have your first Sit 1 — you need to be curious and honest. But you do need to know enough to earn the second appointment.

WEEK 1 — Set Up & Your Warm Market List

✓ Days 1–7 Checklist

Complete onboarding paperwork, system access (CRM, proposal tool, Helio email)

Confirm your state(s) and review the Market Intelligence Guide for your market

Confirm licensing requirements with your manager:

- CT: Home Improvement Salesperson (HIS) license — required before closing
- MA: Hawker's & Peddler's license (check your specific town requirements)
- NJ / MD / DE: Confirm any county or municipal requirements with your manager

Shadow your manager or a senior rep for 2 full Sit 1 and at least 1 Sit 2 — observe everything

BUILD YOUR WARM MARKET LIST — minimum 100 names:

- Go through your phone contacts, Facebook friends, LinkedIn connections
- List former coworkers, neighbors (current and past), school connections, church/gym/clubs
- Family members and their networks — even if they live out of our territory (referrals travel)
- Anyone who owns a home and pays an electric bill is a potential conversation
- Write the list in your CRM — every name, every contact method

Do not pre-qualify people off the list. Your job in week 1 is to build it, not filter it.

WEEK 2 — Product Knowledge + First Warm Conversations

✓ Days 8–14 Checklist

Read your state's Market Intelligence Guide — know the rate crisis story cold:

- What is the all-in rate in your state right now? What does the avg. family pay per month?
- What specific rate increases happened in the last 12 months — and what's coming next?
- What is the #1 incentive in your state? (CT: battery grant; NJ: SREC-II; MD: Brighter Tomorrow multiplier; MA: Mass Save + ConnectedSolutions; DE: GEP rebate + zero sales tax)

Practice your 'friend conversation' opener — NOT a pitch, a genuine conversation:

'Hey, have you seen what's happening with electric bills around here? I've been helping people in [town] save money on theirs — I'd love to show you what I've been doing.

Would you be open to a quick 30-minute conversation at your kitchen table?'

Make your first 20 warm market contacts — calls, texts, DMs. Goal: 5 Sit 1 appointments booked before end of week 2. Not pitching — booking a friendly conversation.

Study the 2-sit process: know what questions to ask in Sit 1, what to bring to Sit 2

Read through the Finance Partner Guides — understand loan vs. TPO at a basic level

WEEKS 3–4 — First Sit 1s & Trade Partner Awareness

✓ Days 15–30 Checklist

Complete your first 5 Sit 1 appointments — debrief each one with your manager same day

Book Sit 2 before you leave every Sit 1 — do not leave without a confirmed date/time

Log every appointment, every outcome, every next step in your CRM immediately after

Begin identifying trade partner targets in your area (we'll go deep on this in Days 31–60):

- Who is the most active roofer in your territory? (heating oil company? alarm dealer?)
- Do you personally know anyone in pest control, HVAC, or home services?
- Note these names — you are not approaching them yet, you're building the list

Attend your first tabletop event or home show if one is available — observe how it runs

Learn the basics of system sizing and proposal generation (shadow Operations if needed)






Complete at least 1 Sit 2 and attempt your first close

Ask for referrals from every Sit 1 — even if they don't buy, they know someone who will:

'Who else do you know who'd want to see this? I'm not asking them to buy — just to learn.'

Read and understand the contract your customer will sign — know every section

Days 1–30 Success Milestones

	Warm market list	100+ names in CRM — contacts, family, former colleagues, neighbors
	5 Sit 1s booked	5 Sit 1 appointments completed from warm market
	First close attempt	At least 1 full Sit 2 completed; contract presented
	State rate story	Can explain your state's rate crisis and #1 incentive from memory in under 2 minutes
	Trade partner radar	3+ potential trade partners identified by name and company



31–60
DAYS

BUILD YOUR NETWORK

Close your first deals, launch trade partnerships, and work your installed blocks.

Month two is where your business starts compounding. You're closing deals from your warm market, you're starting conversations with trade partners who can send you a deal a week, and you're learning to work installed neighborhoods where every house on the block is a walking testimonial. Do all three and you will never have a dry pipeline.

TRADE PARTNER STRATEGY — 'Follow Your Dollars'

The single best source of scalable leads is a network of trusted trade partners — professionals whose customers are the same homeowners you want to reach, and who can personally vouch for you. Think about it this way: a pest control tech who visits 8 homes a day and recommends you is worth more than a hundred cold conversations.



Your Target Trade Partner Categories

ROOFERS — The #1 partner in solar. Every roof replacement is a solar conversation.

- Timing is perfect: customer is already spending money on their home, already thinking about it
- Roofers see the roof condition, angle, and shading before you do — pre-qualified leads
- Pitch to roofer: 'I'll never compete with you. When I have a customer who needs a roof, you get the call. When your customer asks about solar, I get the call. Deal?'
- Target: find 2–3 active local roofers. Buy them lunch. Start with one deal each way.

HEATING OIL & PROPANE COMPANIES — Bills that make solar an obvious conversation.

- Oil/propane customers pay \$3,000–7,000/year to heat their home AND pay electric bills
- Heat pump + solar is a complete electrification story — one rep can close both
- Pitch to oil company: 'Your customers call you every winter stressed about their bill. What if you could offer them a path to never buying heating oil again?'
- These companies often have customer lists — co-marketing events are possible

PEST CONTROL COMPANIES — High visit frequency, trusted relationship, inside the home.

- Pest control technicians visit the same home 4–8 times per year — deep trust built
- They're inside and outside the home — they see the roof, the panel, the backyard
- Pitch to owner: 'Your tech is already on the property. A simple question — "Have you looked at solar?" — is worth money to both of us.'
- Structure: flat referral fee per sit booked, or per install completed

ALARM & SECURITY DEALERS — Installing during purchase = perfect solar conversation timing.

- Alarm installations happen when people move into or upgrade their home
- Homeowner is already in 'improvement mindset' — open to conversations about energy
- Alarm installers are in attics, basements, throughout the house — they see the panel

HVAC / AIR CONDITIONING COMPANIES — Summer AC season is solar season.

- A/C installation = customer is paying attention to their electricity bill right now
- Heat pump crossover: HVAC company recommends heat pump, you finance with solar
- 'When your customer gets a new HVAC system, I'll help them pay for it with solar savings'

REAL ESTATE AGENTS — New homebuyer = new energy bill they've never seen before.

- First-time homeowners are discovering utility bills for the first time — motivated
- Agents who recommend you as a resource become trusted referral partners
- Offer to present at their office meeting: '5 things your buyers need to know about energy'



✓ Days 31–45 Checklist — Trade Partner Launch

Identify 10 specific trade partners by name and company in your territory

(at least 2 roofers, 1 pest control, 1 heating oil/HVAC, 1 alarm dealer, 1 real estate agent)

Make first contact with at least 5 of them — phone call or in-person drop-in, not email

Goal: a 20-minute sit-down, not a pitch. Learn their business first.

Establish a clear, simple referral structure with your first 2 trade partners:

- Be specific: what happens when they send a referral? What do they get? When?
- Keep it simple — a complex commission structure kills trade partnerships

Continue warm market appointments: you should still be booking 3–5 new Sits per week

Close your first 1–2 contracts from warm market

After each close: ask for 3 referrals before you leave — warm market closes are gold mines

Attend 1 tabletop event or home show — bring a sign, a tablet, and a compelling rate fact:

'Did you know the average [state] family pays \$X/month on electricity? Come see why.'

BLOCK STRATEGY — Work Every Installed Neighborhood



After Every Install — Work the Block

The moment a Helio system goes live in a neighborhood, that house becomes your best sales tool.

Neighbors notice the panels. They ask. They wonder. Work that block while the interest is hot.

HOW TO WORK AN INSTALLED BLOCK:

1. Get permission from your customer to use their story (most will say yes — they're proud)
2. After installation day, contact neighbors within 48 hours while the install is still visible
3. Opening: 'Hi, I'm [name] with Helio Solar — I just finished a project for your neighbor at [number]. They're going to save about \$X/month on their electric bill. I wanted to offer you the same complimentary energy review while I'm already in the neighborhood.'
4. You are NOT cold-knocking — you have a warm anchor: their neighbor's system
5. Work a 5-house radius minimum: both sides, across the street, diagonal corners
6. Leave a door hanger on any house where no one answered — include your customer's address so neighbors can see the actual system ('I just finished a project at 14 Oak Street')

WHY THIS WORKS:

- Social proof is the most powerful sales tool that exists — the panels are visible daily
- Neighbors in the same neighborhood have the same utility (easy proposal)
- Same rate story, same incentives, same approximate bill — your proposal builds fast
- Familiarity with Helio in the neighborhood compounds over time

TARGET: Every install generates at least 1 additional booked Sit 1 from block neighbors.

✓ Days 46–60 Checklist — First Installs & Block Work

Work the block on every install you're involved with — minimum 5 neighbor contacts per install
 Run at least 3 Sit 2s this month — present complete proposals, practice your close
 Goal: 2 total signed contracts by Day 60
 After each closed deal: confirm install timeline with customer and schedule block strategy visit
 Check in with trade partners — did any of them send a referral? Follow up on the ones who didn't
 Build a simple tracking system: which trade partners have sent referrals? Which haven't?
 Run your first tabletop event independently — set up, engage, collect info, follow up
 Begin building your referral flywheel: every closed customer → 3 referral names → new warm conversations
 Do a midpoint review with your manager: pace, close rate, pipeline health, trade partner progress

Days 31–60 Success Milestones

	2 contracts closed	2 total signed contracts submitted to Operations
	5 trade partners	5 trade partners contacted; 2 with active referral agreements in place
	Block strategy live	Worked the block on at least 2 installs; at least 1 Sit 1 booked from block
	First tabletop	Ran or assisted with at least 1 tabletop event; leads collected and followed up
	Referral flywheel	5+ referral names collected from closed customers and warm market converts



61–90
DAYS

CLOSE & SCALE

Build repeatable systems, deepen trade partnerships, and create a self-sustaining pipeline.

By Day 61, you should have income flowing, a handful of trade partners generating leads, and a block strategy that works. Month three is about turning those early wins into a repeatable system. The goal is simple: by Day 90, you should never have to wonder where your next deal is coming from.

DEEPENING TRADE PARTNERSHIPS



From Introduction to Machine — How to Scale Trade Partners

A trade partner who sends you 1 deal becomes a partner who sends you 4 when you treat them right. Here's how to turn a new contact into a consistent pipeline:

STEP 1 — First deal together: Do it perfectly. Communicate every step. Make your trade partner look like a hero to their customer. Speed and professionalism are everything.

STEP 2 — Debrief every referral: After the install, call your trade partner and tell them the outcome. 'Your customer just had their system installed — they're saving \$140/month.', 'They mentioned what a great recommendation you made.' Make them feel the win.

STEP 3 — Reciprocate. Actively send referrals back to your trade partners.
Every customer conversation: 'Do you need a new roof?' 'When did you last have your HVAC serviced?' 'Who handles your pest control?' Your partners notice when you send work.

STEP 4 — Formalize. Once you've done 2–3 deals together, have a real conversation about volume: 'If you sent me 5 customers a month, here's what we could both be earning...'
Turn informal referrals into a structured, recurring partnership.

STEP 5 — Event crossover. Co-host a table at a local home show or community event.
'Helio Solar + [Roofing Name]: Complete Home Energy Solutions' — one table, two brands, twice the reach, shared cost.

TABLETOP EVENTS & HOME SHOWS — Running Them Right



Tabletop Event Playbook

Tabletop events and home shows are not passive. You don't sit behind a table and wait. You are there to start conversations. Here's how to run a table that generates leads:

SETUP:

- Clean Helio-branded display — professional, not cluttered
- A single compelling hook statement on the table: 'The average [state] family pays \$X/month on electricity. We help them cut that in half.'
- Tablet or printed visuals showing a sample bill and a sample solar savings estimate
- A simple info-capture method (tablet form, business cards with follow-up note)

YOUR APPROACH AT THE TABLE:

- Stand in front of the table, not behind it — you're approachable, not a cashier
- Opener: 'Have you seen what's happening with electric bills in [state] lately?'
This is a conversation starter, not a pitch. Let them respond.
- Qualify fast: 'Do you own your home?' — if no, thank them and move on
- Goal: book a Sit 1, not close a deal at the table. Get the appointment.
'I'd love to show you a full breakdown — it takes about 30 minutes.'
'Are you free Tuesday evening or would Saturday morning work better?'

FOLLOW-UP (within 24 hours of the event):

- Every contact you made gets a follow-up: text, call, or email
- Reference the conversation: 'Great talking to you at the [event] yesterday — I wanted to lock in that time we talked about.'
- If they don't respond: follow up again at 72 hours, then 1 week. Persistence wins.

TRACK YOUR EVENTS: Contacts made → Sit 1s booked → Sit 2s → Closed deals.
Each event should improve your conversion rate as you refine your approach.

Days 61–90 Checklist

Review every contract in your pipeline — know the status of each one, every step
Deepen your top 2 trade partnerships: have the 'volume conversation' if you've done 2+ deals
Add 3 new trade partner categories you haven't approached yet
Run at least 2 tabletop events or home shows independently this month
Work the block on every install — minimum 5 neighbor contacts per install
Build your battery upsell into every Sit 2 — know your state's battery program cold:
CT: Energy Storage Solutions (up to \$16K + 10-yr performance payments)
MA: ConnectedSolutions \$275/kW/year + SMART 3.0 battery adder
NJ: No rebate yet — use rate volatility + EO 2 incoming program angle
MD: RCES Battery Grant (FY2026) + rate hedge story
DE: Rate crisis + SEU financing + resilience story
Learn the electrification bundle — solar + battery + heat pump + EV charger:
'Let's size your system for the home you're going to have in 5 years, not just today.'
Run a 30-day review: contracts closed, Sit 1 → Sit 2 → close conversion rates
Target: 4+ total signed contracts by Day 90
Complete formal 90-day review with your manager — set months 4–6 goals
Identify your first potential sub-rep or referral associate if you want to build a team



The Referral Flywheel — Your Long-Term Engine

How the Flywheel Works

Every closed deal plants seeds for the next three. Build this habit into every interaction:

AFTER EVERY SIT 1 (even if they don't advance):

'I appreciate your time. Who else do you know who might want to see this?

I'm not asking them to buy — just to learn what their options are.'

AFTER EVERY SIT 2 / CLOSE:

'We're going to take great care of you. While we're talking — who are the 3 neighbors or friends you'd most want to save money like you just did?'

Get names and numbers before you leave.

AFTER INSTALL:

Call or text your customer: 'System looks great! How are you feeling about it?'

Then: 'Have any of your neighbors asked about it yet? I'd love to talk to them.'

ONGOING REFERRAL CARE:

Stay in touch with your customer base. A quick text when rates go up in their state.






A call when the battery program in their state gets better.

Customers who feel remembered send referrals years later.

One referral from a happy customer closes at 3–5× the rate of a cold prospect.

Your warm market never truly ends — it just keeps expanding through every happy customer.

Days 61–90 Success Milestones

	4+ contracts	4 total signed contracts submitted to Operations by end of Day 90
	Active trade pipeline	At least 2 trade partners actively sending referrals; at least 1 deal from a trade partner
	Event rhythm	2+ events run independently this month; improving event conversion rate
	Battery close	Presented battery upsell in every Sit 2; at least 1 battery add-on included in a contract
	90-day review	Formal review completed; months 4–6 goals set with manager



The 2-Sit Close — In Depth

How to run every appointment — from 'yes, come over' to signed contract.

Sit 1 — Discovery & Education

The goal of Sit 1 is simple: build enough trust and understanding that the customer genuinely wants to come back for Sit 2. You are not closing today. You are planting a seed and watering it with education.

Phase	What You're Doing	What You're Saying / Asking
Arrive & Connect (5 min)	Build rapport; be a person, not a salesperson	Ask about the home, the neighborhood, how long they've lived there
Discover the Pain (10 min)	Understand their current bill and frustration	'Have you noticed your electric bill changing lately?' — let them vent; listen more than you talk
Educate on the Problem (10 min)	Walk them through the rate story for their state	Show the rate increase history; explain WHY bills are going up (use your state's Market Guide)
Educate on the Solution (10 min)	Explain how solar works at a high level; net metering	'Here's how you stop renting energy from the utility and start owning it'
Preliminary Numbers (5 min)	Show a rough savings estimate — not a full proposal	'Based on what you've told me, you could be saving somewhere in the range of \$X to \$Y/month'
Book Sit 2 (5 min)	Leave with a confirmed appointment — non-negotiable	'I want to come back with a full, accurate proposal customized for your home. Are you free [day]?'



Sit 1 Rules

- Never leave without a confirmed Sit 2 date and time — written down, in your phone, in their calendar.
- Never bring the full proposal to Sit 1 — it turns an education conversation into a pressure situation.
- Always ask: 'Is there anyone else who'd typically be part of a decision like this?' — get the decision-maker in the room for Sit 2. Never do Sit 2 without all decision-makers present.
- At the end: 'Before I go — who else do you know who might want to see what I just showed you?'
- Leave behind: your card, a simple one-pager about the rate story, and your Sit 2 confirmed time.

Sit 2 — Proposal & Close

Sit 2 is where all your preparation pays off. You come in with a complete, professional proposal, you walk through the value stack, and you ask for the business. Every decision-maker must be present. No exceptions.

Phase	What You're Doing	Key Points
Re-establish (5 min)	Reconnect; reference Sit 1; ask if they had any questions since you left	'Did anything come up that you wanted me to address?' — clear the deck before you start
Present the System (5 min)	Walk through the proposed system size and why it fits their usage	Tie it to their actual bill from Sit 1 — personalization builds trust



The Value Stack (15 min)	Present every source of value in order: bill savings → state incentives → SREC/ program income → tax exemptions → home value	Use your state's specific numbers — vague incentives don't close; specific dollars do
Finance Options (10 min)	Present 2–3 finance paths clearly	Cash, loan (show monthly savings vs. monthly payment), and TPO (if applicable) — let them choose their comfort
Address Concerns (10 min)	Pause; ask 'What questions do you have?' — answer thoroughly	Never skip this. Concerns not addressed = deals that fall apart after signing
The Ask (5 min)	Close clearly and directly	'Based on everything we've been through — does this make sense for your family?' Then stop talking.

Sit 2 Rules

- If both decision-makers weren't available: reschedule. Do not present to one half.
- Lead with the monthly number: 'Instead of paying the utility \$195/month, you'd pay \$110/month on your loan. The difference is yours — and it grows every time rates go up.'
- Use specific state incentive numbers — never round down. '\$864 per year in SREC income' beats 'some extra income from solar certificates.'
- Present finance options as a choice, not a default: 'Which of these feels most comfortable?'
- After you ask for the close: silence. The next person who speaks loses. Wait for their answer.
- If they say 'let us think about it': 'Of course — what specific concern do you want to think about?' Address that concern right now. 'I'll think about it' is usually a hidden objection.
- Before you leave (close or not): referral ask and block strategy mention.

The Solar Value Stack — Know This Cold

Every Sit 2 proposal presents value from multiple sources. Stack them in this order — from most tangible to most aspirational:

Value Source	What It Is	How to Present It
Monthly Bill Savings	Offset utility bill with net metering credits at full retail rate	'Your bill goes from \$195 to roughly \$52/month in non-solar charges. That's \$143/month back.'
SREC / Program Income	State-mandated payments for clean energy production	'Maryland pays you \$792/year for the energy your panels generate. That's a second check from your roof.'
Upfront Rebates	Green Energy Program (DE), MSAP grant (MD), SMART (MA battery)	'Before you spend a dollar, the state gives you \$X back — here's exactly how that works.'
Rate Hedge	Locking in energy cost vs. rising utility rates	'Your bill went up X% last year. This loan payment is fixed for 20 years. The utility cannot touch it.'
Tax Exemptions	Sales tax + property tax exemptions in all 5 states	'You pay zero sales tax on the system, and your property taxes won't go up a cent — guaranteed.'
Home Value	Solar adds \$15,000–20,000+ to resale value in our markets	'You're not spending money — you're investing it in an asset that stays with the home.'



HELIO SOLAR
SOLAR ENERGY SOLUTIONS

Battery Income

CT up to \$16K + payments; MA
ConnectedSolutions \$275/kW; others

'Your battery earns money too — here's
how that program pays you back over 10
years.'



Market & Compliance Quick Reference

The facts you need — state by state.

State	Avg. All-In Rate	#1 Rate Story Fact	Crown Jewel Incentive	Critical Compliance Note
CT	~31.64¢/kWh #1 in continental US	Supply resets Jan 1 & Jul 1. Jan 2026: Eversource +30%. Bills routinely over \$220/month.	Energy Storage Solutions battery: up to \$16,000 upfront + 10-yr performance payments	HIS license REQUIRED before closing. No exceptions.
MA	~31.22¢/kWh 3rd highest nationally	Rate resets twice a year. Bills averaging \$167–178/month on below-avg. usage.	Mass Save heat pumps up to \$10,000 + ConnectedSolutions \$275/kW battery. SMART 3.0 for battery-paired systems.	Hawker's & Peddler's license recommended. Check your specific town before any canvassing.
NJ	~24–26¢/kWh Up 50% in 5 years	June 2025: all 4 utilities raised rates simultaneously 37–40%. Gov. Sherrill declared energy emergency.	SREC-II: \$90/SREC fixed × 15 years. 8 kW = \$864/year. 10 kW = \$1,080/year — guaranteed.	Solicitor's Permit required in most municipalities. Get the No Solicitation List before any block work.
MD	~21.05¢/kWh 25% above national avg	Delivery rates up 59% since 2015. BGE rate case resets in 2026. Data center PJM spike ongoing.	Brighter Tomorrow Act 1.5× SREC multiplier (expires Jan 2028). MSAP: \$750/kW grant up to \$7,500 for ≤150% AMI.	HOAs are common in Montgomery/Howard/PG Co. Flag early. Check county-level solicitation requirements.
DE	~18.81¢/kWh 17th highest nationally	16.2% base rate increase filed Jan 2026. 6.95% supply increase coming June 2026. Bills doubled for many in 2023–24.	Zero sales tax on solar (unique to DE). GEP rebates up to \$6,500 (DEMEC customers). NEM under review — enroll customers now.	Know your customer's utility (Delmarva vs. DEC vs. DEMEC) BEFORE quoting — rebate amounts and SREC rules differ completely.

Finance Partner Cheat Sheet

Match every customer to the right product before Sit 2. Wrong product = declined loan = lost deal.

Finance Partner	Best For	Key Terms	Min. FICO	Dealer Fee
GoodLeap	Most residential customers; fast approvals; widest product range	Loan: 10/15/20-yr; solar, storage, roofing	~680	Yes — varies by term; confirm current
LightReach (Palmetto)	\$0 down TPO (lease/PPA); customers who prefer no ownership	PPA or Lease; CT, MA, MD, NJ eligible	~670	N/A — TPO structure
Climate First Bank	Customers who want no dealer fees and transparent fixed rates	Loan: 10.5 or 20.5 yr; fixed rate; no prepay penalty	Confirm with team	None



Sungage Financial	Customers declined elsewhere; flexible underwriting	Loan; English contracts only; counteroffers go to homeowner (not you)	Flexible	Confirm with team
EnFin (Qcells-backed)	Competitive rates; manufacturer-linked credibility story	Loan: 10–25 yr; soft check upfront; no prepay penalty	Flexible	Confirm with team

Hard Rules — Never Break These

NEVER quote the 30% federal tax credit for customer-owned systems — it expired Dec 31, 2025. TPO structures may have §48E value — confirm with finance team before representing it.

NEVER promise a specific SREC price — markets fluctuate. Use conservative estimates and always clarify that SREC prices are not guaranteed.

NEVER misrepresent a customer's utility program. Confirm the utility BEFORE quoting incentives. (DE example: Delmarva and DEMEC have completely different rebate amounts and SREC rules.)

NEVER close a CT deal without your HIS license active. Contracts signed by unlicensed reps can be voided — you lose the deal and Helio loses the installation.

NEVER do a Sit 2 without all decision-makers present. A one-sided close falls apart.

NEVER tell a customer their HOA can't stop them from going solar without confirming — they CAN regulate placement, visibility, and aesthetics, even if they can't outright ban solar.



Goals, Glossary & Contacts

Track your progress. Know your terms. Know who to call.

90-Day Goals at a Glance

Milestone	Day 30 Target	Day 60 Target	Day 90 Target
Warm market list	100+ names built	Actively working; adding referrals	Fully in CRM; referral flywheel running
Sit 1 appointments	5 completed	15 cumulative	30+ cumulative
Sit 2 / proposals presented	1	5	12+
Contracts signed	0–1	2	4+
Trade partners identified	3 targeted	5 contacted; 2 active	3 active; 1 deal from trade partner
Block strategy	Aware of concept	Working every install block	Habit — automatic after every install
Tabletop events	1 attended (shadowed)	1 run independently	2+ run independently
Referrals collected	5 from warm market	10+ total	20+ total; flywheel running
Battery pitch	Know your state's program	Presenting on every Sit 2	Closed at least 1 battery add-on

Key Glossary — Terms Every Helio Rep Must Know

Item	Details
2-Sit Close	Helio's sales model: Sit 1 = education and discovery, no close. Sit 2 = full proposal and contract. Never collapse into one sitting.
Warm Market	People you already know — friends, family, former colleagues, neighbors, social connections. Your fastest path to first deals.
Trade Partner	A business professional who sees the same homeowners you target: roofers, pest control, heating oil companies, alarm dealers, HVAC, real estate agents. Referral partnerships with these pros multiply your reach.
Block Strategy	After every Helio install, contacting the surrounding 5+ neighbors using the installed home as a warm anchor and social proof.
Referral Flywheel	The ongoing cycle of asking for referrals from every warm market conversation, every Sit 1, every close, and every installed customer.
SREC	Solar Renewable Energy Certificate — 1 SREC = 1 MWh of solar production. Income paid by utilities to meet state renewable mandates. NJ: \$90 fixed × 15 yrs. MD: ~\$50–60 market rate. DE: ~\$30 yrs 1–10.
Net Metering / NEM	1:1 credit at full retail rate for excess solar exported to the grid. Used in MA, NJ, MD, DE. Credits roll forward and never expire.
RRES	Connecticut's solar program — replaced net metering in 2022. Two options: Netting Tariff (retail credits, 20 yr) or Buy-All Tariff (\$0.3289/kWh fixed, 20 yr).



SMART 3.0	Massachusetts production-based solar incentive. Currently \$0/kWh for solar-only; battery-paired systems earn positive monthly payments.
SREC-II / SuSI	New Jersey's successor solar incentive. \$90 fixed per SREC for 15 years — the highest fixed SREC rate in our territory.
Brighter Tomorrow Act	Maryland law granting 1.5× SREC multiplier for rooftop solar installed July 2024 – January 2028. Expires — creates real urgency.
Green Energy Program (DE)	Delaware's per-watt solar rebate. Delmarva: \$0.70/W up to \$6,000 (must assign SRECs). DEC: \$0.50/W + keep SRECs. DEMEC: \$1.00/W + keep SRECs — best deal.
ConnectedSolutions	MA/CT battery demand response program. \$275/kW annually for 5 years (MA). Paid by utility for allowing battery dispatch during summer peak events.
MSAP	Maryland Solar Access Program. \$750/kW grant (up to \$7,500) for households ≤150% AMI. A grant — not a loan, not a tax credit. Launched July 2025.
TPO	Third-Party Ownership — lease or PPA structure where the developer owns the system. LightReach is Helio's primary TPO partner. Good for customers who want \$0 down with no ownership responsibility.
PTO	Permission to Operate — the utility's final approval that allows the solar system to turn on and begin generating. The finish line for the installation process.
HIC	Home Improvement Contract — the legally required contract for residential solar in most of our states. Always use Helio's state-specific HIC.
PJM	Regional grid operator covering NJ, DE, MD, PA and surrounding states. PJM capacity auction prices are the #1 driver of recent rate spikes in our territory — know this story for NJ and DE customers especially.

Key Resources

Item	Details
State Market Intelligence Guides	Deep-dive guides for CT, MA, NJ, MD, and DE — rates, utilities, incentives, timelines, compliance. Your reference for every Sit 1 and Sit 2.
Finance Partner Guides	GoodLeap, LightReach, Climate First Bank, Sungage Financial, EnFin — read all five; know which to use when.
CRM / Proposal Tool	Log every warm market contact, every Sit, every outcome. Your business lives here.
DSIRE Database	programs.dsireusa.org — authoritative database of all solar incentives by state. Bookmark it.
Your Manager	First call for everything in the first 90 days. Weekly 1:1 — come with specific questions.
Helio Operations	After the contract: permitting, utility issues, SREC enrollment, installation updates, PTO status.
Helio Compliance	Licensing questions, contract issues, HOA situations, state-specific requirements.



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