



HELIO SOLAR

SAFE. SIMPLE. SUSTAINABLE.

SALES TOOL TRAINING GUIDE

How to Use the Solar Guide & Trifold

in the 2-Sit Close



SOLAR GUIDE

YOUR TOOL FOR SIT 1

Discovery · Site Analysis · Needs



TRIFOLD

YOUR TOOL FOR SIT 2

Company · Product · Proposal · Close

Two tools. Two sits. One close.

This guide shows you exactly when to open each section, what to say, and why it works.

Updated: February 2026



The Two Tools, Explained

One for listening. One for showing. Together they close.

Why We Use Two Tools Across Two Sits

Most reps fail because they try to educate and close in the same conversation. The customer hasn't built trust yet, they haven't had time to process, and they haven't mentally accepted the rate crisis as something they need to solve today. Two sits solve all three of those problems.

Each tool has a specific job that matches where the customer is in their decision:



SOLAR GUIDE

SIT 1 — DISCOVERY

A structured notepad and conversation guide. It lives on the table between you and the customer — not in your hands being presented. You fill it in together.

Its job:

- Ask the right questions in the right order
- Record answers you'll use to build the Sit 2 proposal
- Keep the conversation structured without feeling scripted
- Pre-surface objections before they become deal-killers
- End with a confirmed Sit 2 date, time, and who's attending



TRIFOLD

SIT 2 — PROPOSAL & CLOSE

A professional leave-behind and presentation tool. You walk through it page by page with the customer. It builds credibility, backs up your proposal, and gives the customer something tangible to own.

Its job:

- Establish Helio's credibility (accreditations, BBB, warranties)
- Educate on product quality — panels, inverters, racking
- Show the system anatomy so the customer understands what they're buying
- Support your proposal with third-party validation
- Leave behind something for the customer to review and share



The Golden Rule of Both Tools

The Solar Guide is for LISTENING. The Trifold is for SHOWING.

In Sit 1: The Solar Guide is on the table. You are asking, the customer is talking. You are filling in their answers, not presenting slides. If you are talking more than the customer during Sit 1, you are using the tool wrong.

In Sit 2: The Trifold is in your hands. You are walking them through the story — but anchored to what THEY told you in Sit 1. Every page of the trifold connects back to something they said. 'You mentioned aesthetics matter — look at how these panels sit flush to the roof.' This is what transforms a presentation into a close.

What to Bring to Each Sit

Item	Sit 1	Sit 2	Notes
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Solar Guide & Trifold Training | How to Use Your Tools

Solar Guide (filled in)	Bring blank — fill in live	Bring your completed copy	Your notes from Sit 1 build your Sit 2 proposal
Trifold	Leave at home — not yet	Bring one copy per household	Physical copy they can hold and keep
Proposal (printed)	Do NOT bring	Bring printed + digital	Personalized to their usage, their utility, their goal
Tablet / laptop	Optional for pull-up	Yes — for proposal tool	Use to show live proposal; not a slide deck
Business card	Yes	Yes	Leave every time
Your Solar Guide notes	—	YES — review before arriving	Their Q3/Q7 answers shape your entire Sit 2 open



SIT 1 — THE SOLAR GUIDE

How to use every section of the form to run a perfect discovery appointment.

The Solar Guide is your conversation architecture. Every section prompts you to cover a specific area — but it's not a script. It's a structured listening tool. Walk through it naturally. The customer should feel like they're having a great conversation with someone who genuinely wants to understand their situation.


BEFORE THE APPOINTMENT

✓ Pre-Sit 1 Checklist

- Print a blank Solar Guide — never use a pre-filled copy
- Review your notes from the warm market or referral conversation that led to this sit
- Know your state's current all-in electricity rate and one rate-increase fact to anchor the conversation
- Confirm date, time, and WHO will be home — remind them to have their spouse/partner present
- Bring a copy of your business card
- Know which utility serves this address — it affects everything in your Sit 2 proposal

SECTION: CUSTOMER DETAILS

Fill this in before you start the discovery questions — it signals professionalism and gives you their exact details for the CRM. Don't fumble with spelling mid-conversation.

 SOLAR GUIDE	SECTION Customer Details	Fill in name, address, phone, email, and your name as consultant. Do this together — hand them the form to spell out their email. It creates immediate engagement.
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☰ Natural opener while filling customer details

- 'Before we get started, let me grab your information so I have everything accurate.'
- 'And this is going to be for [address], correct?'
- 'Great — and the best number to reach you at?'

This 90-second exchange does three things: it grounds the conversation in their home, it feels professional, and it confirms they're serious enough to give you their contact info.

SECTION: DISCOVERY — CHECKBOX QUESTIONS

These four checkbox questions are your warm-up — quick, low-stakes, and they reveal critical facts for your proposal and their 'stay' story.

 SOLAR GUIDE	SECTION Discovery — Checkboxes	How long have you lived here? / How long do you plan to stay? / How old is your roof? / How important are aesthetics?
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Question	What It Tells You	How to Use It
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How long have you lived here?	Established homeowner vs. newer buyer — context for their bill history	'Have you noticed the bill changing much since you moved in?'
How long do you plan to stay?	Ownership vs. TPO; payback period math; home value story	Short-term → TPO/lease + home value. Long-term → full ownership + payback + SREC income
How old is your roof?	Flags a potential adder or disqualifier before design	Under 5 yrs: good. 10–15 yrs: solar could extend life. 16+ yrs: flag for potential roof conversation with your roofer partner
How important are aesthetics?	Guides panel and racking recommendation in Sit 2	'Very important' → all-black panels, IronRidge flush mount. Flag for Sit 2 trifold: Highest Efficiency page + Installation Matters page

SECTION: WALK-AROUND / SITE ANALYSIS

This is where you get off the couch. Ask to see the meter, electrical panel, and walk outside to look at the roof. This has two benefits: it collects the technical data you need, and it physically moves the customer through the experience of owning solar.

 SOLAR GUIDE	SECTION Walk-Around / Site Analysis	Meter (discuss net metering) · Electrical Service Panel (MPU) · Roof Condition & Orientation
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Item	Details
Meter — Net Metering	'Let me show you how this meter is going to work in your favor.' Explain the 1:1 credit concept standing at their actual meter. Real location, real object = real understanding.
Electrical Panel (MPU)	Note the panel brand, amperage, and whether it looks current. A 100A or older panel may need an upgrade — flag it now, not at contract. Surprises kill deals.
Roof Condition / Orientation	South and southwest facing is ideal. Note any shading (trees, chimneys). Take a photo. Flag condition: moss, soft spots, or missing shingles need to be addressed before or during install.
Equipment Priorities (new)	While at the roof: 'Is max production the priority, or are you more focused on value per dollar?' and 'Are you thinking battery storage now or want to be battery-ready?' — these guide your Sit 2 equipment recommendation.

Walk-Around Pro Tips

Always ask permission: 'Would it be OK if I took a quick look at your roof and panel?'

Bring your phone — photograph the roof, the panel label, and the meter. These photos go into the CRM and directly into your Operations handoff after the contract.

If the panel is a Federal Pacific, Zinsco, or pre-1980 fuse box: note it. This will likely require a main panel upgrade (MPU) — factor it into the proposal and set expectations now.

If significant shading exists: do NOT pre-disqualify. Note it and let Operations/design run the numbers. Partial shading with microinverters often still pencils out.

SECTION: NEEDS ANALYSIS — THE 7 DISCOVERY QUESTIONS



Back at the kitchen table, this is the heart of the Solar Guide. These questions are listed on the form — your job is to ask them conversationally, not read them robotically. Take notes in the right column. The customer should be talking 70% of the time.

"What first made you interested in looking at solar?"

WHY: Reveals their primary motivation — virtue buyer (environmental identity) vs. success buyer (financial outcome). Lead Sit 2 with the frame that matches their answer.

Q1

- **Save money / bills too high** → Financial stack leads Sit 2. Monthly savings, payback period, rate hedge. They're buying a win.
- **Going green / do right by the planet** → Open Sit 2 with Helio's mission, the clean energy mandate story. They're buying identity.
- **Rate protection / sick of increases** → Lead with the rate crisis data for their state. They want certainty. Give them the 25-year fixed cost story.
- **Build equity** → Home value argument + SREC income as assets. They're thinking like an investor.

"What's your average monthly electricity bill? Does it swing seasonally?"

WHY: Establishes the financial baseline for your entire proposal. Their number — not a state average — becomes the anchor for every savings comparison in Sit 2.

Q2

- **Ask them to pull up a recent bill** → The actual number closes more deals than any estimate. 'Let me see what we're working with.'
- **Seasonal swing matters for sizing** → A \$350 summer / \$90 winter customer needs a different conversation than a flat-bill household. Note it for design.
- **If they don't know** → 'That's totally normal — let's look it up together.' Pull up their utility's online portal. This builds engagement, not embarrassment.

"Have you looked into solar before? What stopped you?"

WHY: Every answer is a gift — a pre-loaded objection you can address head-on in Sit 2 before it kills the deal.

Q3

- **'Price was too high'** → Sit 2 leads with \$0-down loan, monthly savings vs. monthly payment side-by-side.
- **'Bad experience with another company'** → Acknowledge it. Lead with Helio's accreditations, BBB A+, SolarInsure warranty, 5-star Google reviews. Use the Trifold's 'Go Solar' page.
- **'Wasn't sure it would work here'** → Prepare local production data. 'Here's what your neighbor's system produces — and theirs is on a north-facing roof.'
- **'Nothing stopped me, just never got around to it'** → Highly closeable. Sit 2 focuses on urgency: rate increases already locked in, incentive windows expiring.

"How long do you plan to stay in this home?"

WHY: Determines the right financial structure and which value story lands hardest.

Q4

- **7+ years (forever home)** → Full ownership. Payback math works strongly. 'You'll own this free and clear before your neighbors stop paying the utility.'
- **3–7 years** → Home value appreciation story + transferable TPO as an option. Use the Trifold's warranty/quality pages — it's an asset they're selling.
- **Unsure / possibly moving** → LightReach TPO lease — transferable to next buyer, makes the home more attractive to purchasers.



Q5

"Is reducing your environmental footprint something that matters to your household?"

WHY: A commitment trigger. Calibrates how much environmental language to use in Sit 2.

- **'Yes, very much'** → Weave clean energy mission throughout Sit 2. Open with Helio's sustainability story. Connect their system to state mandates.
- **'Somewhat, but mainly the money'** → Acknowledge briefly. Stay 90% financial in Sit 2. One environment mention is enough — don't over-rotate.
- **'Not really, just the savings'** → Don't bring up environment in Sit 2 unless they raise it. Some customers feel patronized by green messaging they didn't ask for.

Q6

"When it comes to a decision like this, who else is typically part of the conversation?"

WHY: Identifies every decision-maker. A Sit 2 without all decision-makers is a wasted appointment.

- **'My spouse and I decide together'** → Both must be present at Sit 2. Non-negotiable. Reschedule if needed. Never present to one half of a couple.
- **'Just me'** → Confirm sole ownership. Simpler Sit 2 — one decision-maker, move efficiently.
- **'I'd want to run it by my son / advisor'** → 'Would it make sense to have them join us at Sit 2? I can answer their questions directly.' Get the influencer in the room.
- Book the Sit 2 using their names: 'So I'll see you and [name] on [day] at [time].' Named confirmation is harder to cancel.

Q7

"If the numbers make complete sense, is there anything else that would hold you back from moving forward?"

WHY: The pre-close objection surface. Every answer becomes a Sit 2 agenda item. This is the most important question on the form.

- Ask it and then stop talking. Silence after this question is gold.
- **'No, if it makes sense we'd do it'** → Highly closeable. Write it down. In Sit 2: 'You told me if the numbers made sense, you'd be ready. Here they are.'
- **'I'd want to understand the contract better'** → Bring a sample contract to Sit 2. Walk through each section. Transparency disarms this.
- **'My neighbor had a bad experience with installation'** → Prep the Trifold's Installation Matters page. Photo evidence of Helio's process and IronRidge HUG system.
- **'I'm worried about roof damage / leaks'** → Prep IronRidge HUG UltraGrip seal explanation. Bring a photo or the trifold diagram. '25 years, no leaks, guaranteed.'

SECTION: DISCOVERY — UTILITY BILL



SOLAR GUIDE

SECTION

Discovery — Utility Bill

Copy of most recent bill · Tell me what you know about rate increases · What have you done to control your rates? · Avg. monthly bill + seasonal swing

The Rate Crisis Conversation — Use Their Actual Bill

If they haven't shown you their bill yet, now is the moment:
 'Can you pull up your most recent bill? I want to make sure our proposal is based on your actual numbers.'

Once you see it — use their state's rate story:

CT: 'Your rate is about 31 cents a kilowatt hour — that's the highest in the continental US.'

MA: 'That's over 31 cents — and this just went up 30% in January 2026 alone.'

NJ: 'Your rate went up 37-40% last June. Governor Sherrill declared an energy emergency.'

MD: 'This rate has gone up 59% since 2015. And there's another increase coming in 2026.'

DE: 'A 16% increase was just filed in January — and another 7% is coming in June.'

Then ask: 'If there was a way to eliminate rate increases going forward — would that be something of interest to you?' Wait for their answer. That answer is your close setup.

SECTION: DISCOVERY — NEEDS, BACKUP & FINANCIAL

These sections are on page 2 of the Solar Guide. They expand the picture beyond the solar system itself and open the door to battery, EV, and heat pump upsells.

Section	Key Question	Why It Matters
Discovery Needs	EV in 5–10 years? Pool / hot tub? Planning to electrify heating?	Sizes the system for the future home. A customer planning an EV in 3 years needs a larger system today. Larger system = more SREC income.
Discovery Backup	Ever lost power? How long? What can't lose power? (medical, sump pump, well)	Opens the battery conversation naturally. If they say yes to a critical load — 'That's exactly what battery storage is designed for.'
Discovery Backup	Whole-home backup or just essential circuits?	Sets the scope for battery sizing. Whole-home = larger battery; essential circuits = smaller, more affordable starting point.
Discovery Financial	How familiar with incentives? How do you pay taxes? Finance preference?	Maps the customer to the right finance path before Sit 2. Don't walk into Sit 2 not knowing if they want cash, loan, or TPO.
Discovery Financial	Strong credit? (Yes / No / Unsure)	Helps you pick the right lender. GoodLeap needs ~680; LightReach TPO ~670; Climate First / EnFin more flexible.

CLOSING SIT 1 — THE ONLY JOB LEFT



How to End Sit 1

Review your notes. Summarize what you heard:

'So based on everything you've shared — your bill is around \$210/month, it's gone up a lot in the last few years, and you're planning to stay here long-term. I'm going to put together a full proposal based on your exact numbers and come back with everything you need to make a decision. Sound good?'

Book the Sit 2 before you stand up:

'Are you free [day] evening or would [day] morning work better for both of you?'

Get a specific day and time. Write it on the form. Hand them your card.

Referral ask before you leave:

'I really appreciate your time. While I'm thinking of it — is there anyone else you know who might want to see what I just showed you? I'm not asking them to buy anything — just to have the same conversation we had today.'

Leave the Solar Guide with them OR take your copy for the CRM and proposal build.

The filled-in form is your Sit 2 blueprint.

SIT 2 — AURORA + TRIFOLD

Three acts: Aurora (their home) → Trifold (our company) → Aurora (the numbers). One close.

Sit 2 has a deliberate three-act structure. You open in Aurora to ground the conversation in something personal — their actual home and usage. Then you pause and pivot to the trifold to rebuild the warmth and rapport from Sit 1 before any money is discussed. Then you return to Aurora for the financials and close. This sequencing is intentional: it prevents the appointment from feeling like a pitch and keeps the customer in discovery mode right up until the moment you ask for the business.



BEFORE THE APPOINTMENT

✓ Pre-Sit 2 Checklist

- Re-read your Solar Guide notes from Sit 1 — know their Q3 objection and Q7 answer cold
- Build and review the complete Aurora proposal — verify usage numbers match their actual bill
- Check the Aurora design: does the panel layout look clean and make sense for their roof?
- Note which trifold pages are most relevant based on Sit 1 answers (aesthetics? backup power? concerned about roof? bad prior experience?)
- Confirm both decision-makers are attending — call or text 24 hours before
- 'Just confirming we're still on for [day] at [time] — looking forward to showing you the design.'
- Know your state's most compelling urgency trigger for the close
- Bring the trifold (printed) + tablet/laptop with Aurora open

ACT 1 — AURORA: Warm Up & Confirm

Open with their home on the screen. Make it personal before it's financial.

STEP 1 — RECONNECT & CLEAR THE DECK

The Warm-Up Before You Open Aurora

Before opening any tool, reconnect as a person:
'Great to see you both — how have you been? Did anything come to mind since we last talked?'

Shut up and listen. If any questions or concerns surface — answer them now, not later.
An unaddressed concern at the start of Sit 2 festers and becomes a deal-killer at the close.

Once the deck is clear, open Aurora and turn the screen so both customers can see it.

STEP 2 — AURORA SLIDE 1: USAGE CONFIRMATION

Open with the usage and production summary — current consumption and projected growth over 25 years. This is not a number slide. It's a mirror: you're showing them their own situation back to them, validated by data.



AURORA

SECTION

Slide 1 — Usage & 25-Year Projection

Show current annual usage, projected growth over 25 years, and what the system covers year by year.

What to Say at the Usage Slide

'So based on the information you shared with me, here's your home right now.'

Point to current usage: 'You're using about [X] kilowatt hours per year. That's [their bill] a month going to [utility] today — and here's where that goes over 25 years without solar.'

Point to the growth projection: 'See this line? This is what utility rates have historically done. That's not a prediction — that's what actually happened to your neighbors over the last 25 years.'

If they're planning future electrification (from Sit 1 — EV, heat pump, pool):
'And remember you mentioned you might be getting an EV in the next few years? We sized this system to handle that load too — so you're not coming back to add panels later.'

Let them react. Ask: 'Does that match what you've been experiencing with your bills?' Their answer reconnects them to the pain that brought them here in the first place.

STEP 3 — AURORA SLIDE 2: THE DESIGN ON THEIR HOME

This is the moment the system becomes real. They see panels on their actual roof — their address, their house, their panels. This is one of the most powerful moments in the entire 2-sit process. Pause here and let them take it in.



AURORA

SECTION

Slide 2 — System Design on Home

Show the panel layout on their actual roof aerial image — placement, quantity, array orientation.

What to Say at the Design Slide

'And here's your home.'

Pause. Let them look. Don't talk over their reaction.

If aesthetics mattered (Sit 1 Q4): 'Notice how clean this looks — the panels sit flush, the wires are hidden behind the array, no visible framework. From the street, it's sleek.'

Walk them through the placement logic: 'We put the main array here on the south-facing section — that's your highest-production surface. The [secondary array] catches morning light.'

Let them ask questions about the design. Answer them. This is curiosity, not resistance.

Then — before you go any further — make the pivot:



THE PIVOT — Word for Word

"Before we go any further with the numbers — let me tell you a little bit about our company."

Set the tablet aside. Pick up the trifold. Place it on the table between you.

Why this works:

The design slide created excitement — but excitement without trust doesn't close. By pausing before the numbers and going to the trifold, you do two things at once: you rebuild the warmth and friendship you established in Sit 1, and you give yourself 10 minutes to re-establish Helio's credibility before the customer sees a price. A customer who trusts you and believes in the company signs. A customer who only sees impressive software doesn't.

ACT 2 — TRIFOLD: Rebuild Rapport & Establish Credibility

Physical tool. Human conversation. No screens.

Walk through the trifold in order. Reference their Sit 1 answers on every page — it proves you listened. The trifold covers the company, the product, the installation, and the warranty. By the time you close it, the customer knows exactly who Helio is and what they're getting. Now the numbers will make complete sense.

TRIFOLD
Page 1 Front
Cover

GO SOLAR — Become Energy Independent

- 'Let me show you a little about who we are and what we do.' Open warmly — this is a conversation, not a pitch.
- Point to the Bryan G. Google review: 'This is a real customer from last year. That experience — from the first conversation to the install — is exactly what I want for you.'
- Tone: unhurried. You are deliberately slowing down before the numbers. That patience signals confidence.

TRIFOLD
Page 2 Go Solar

Financially Sound Company · Peace of Mind · Accreditations

- 'One of the things people want to know when they're making a 25-year commitment is — who is this company and will they be there for me?'
- Point to BBB A+, NABCEP, SolarInsure Partner, Google 5.0, Connecticut Green Bank partner.
- If Q3 surfaced a bad prior experience: 'This is why those certifications matter — they're not just logos, they're accountability.'
- PEACE OF MIND: 'Panels, power production, inverters, racking, and labor. Every component, 25 to 30 years. Nothing falls through the cracks.'
- Technology partners: Enphase, SolarEdge, Qcells, IronRidge, Tesla Powerwall. Names they recognize. Recognition builds trust.



TRIFOLD
Page 3 Highest
Efficiency

Tier 1 Panels · Superior Cell Technology · Flexible Inverters

- Connect to Q4 if aesthetics mattered: 'Remember when you said the look was important to you? These are the all-black back-contact panels you saw on the design — flush mount, hidden wires, no visible frame.'
- 25-year energy yield chart: 'This line here — that's your system. Up to 60% more lifetime energy than a conventional panel. That difference is SREC income and bill savings you don't leave on the table.'
- Inverter options (connect to Aurora): 'For your roof configuration, we're recommending [Enphase microinverters / SolarEdge] — here's why that's the right call for your specific layout.'
- If battery was discussed in Sit 1: 'And this system is battery-ready from day one — we can add storage now or any time without changing the inverter.'

TRIFOLD
Page 4
Installation
Matters

Anatomy of a Helio System · IronRidge HUG™ Mounting

- If Q7 surfaced roof damage concern: open to this page first, before Page 1. 'You mentioned you were concerned about the roof — let me show you exactly how our mounting system works before anything else.'
- Walk the numbered diagram: IronRidge racking → monocrystalline cells → hidden wire management → inverter → Tier 1 panels. 'This is what's going on your home.'
- IronRidge HUG™ UltraGrip Seal: 'This is the piece that prevents any water intrusion — foam and mastic adheres directly to the shingle surface. 25 years, no leaks, unconditionally guaranteed.'
- 'Every installer on our team is NABCEP certified. That's the highest credential in the solar industry. They're not just licensed — they're trained on this exact system.'

TRIFOLD
Page 5
Accessories

Battery Storage · Mobile App · EV Charging

- Battery: Only go here if backup or critical loads came up in Sit 1 Discovery. 'This is exactly what we talked about with [sump pump / medical equipment / outages]. This keeps your home running no matter what happens on the grid.'
- Mobile App: 'Once your system is live, this is what you'll see on your phone — real-time production, performance alerts, everything we see on our end. You're always in the loop.'
- EV: If EV was 'yes' or 'maybe' — 'Every mile you drive on that EV, you're driving on energy you produced on your own roof. You never pay for that fuel at a pump.'
- Only present the accessories that connect to their Sit 1 answers. Don't present all three by default.

TRIFOLD
Page 6 Quality
Is Our Mission

25/30-Year Warranty · Best-in-Class Installation

- This is the trust close — the last thing they hear before you go to the numbers.
- 'I want you to understand exactly what stands behind what I just showed you on that screen.'
- 25 + 30 year warranty badges: 'Panels, production, inverters, racking, labor. 30 years with SolarInsure — that's longer than most people have left on their mortgage.'
- If comparing to another quote: 'The question isn't which proposal looks better on paper today. It's who is going to be there in year 18 when something needs attention. This warranty and this team will be.'
- Close the trifold. Place it face-up on the table between you — leave it there as a physical anchor for the rest of the conversation.

ACT 3 — AURORA: The Numbers & The Close

Back to the screen — now let's get to the good stuff.



THE RETURN PIVOT — Word for Word

"OK — now let's get to the good stuff. The numbers."

Pick the tablet back up. Open Aurora to the financial summary. Turn the screen toward the customer.

STEP 4 — AURORA: THE FINANCIAL PRESENTATION

You're returning to Aurora as a trusted advisor who just spent 10 minutes showing them why Helio is the right company. The customer is warmer now than when you paused. Walk through the financials with confidence — they already know the system, the company, and the warranty. Now they just need to see that the numbers work.

Walking the Aurora Financials

LEAD WITH THEIR NUMBER — always start with the bill they're paying today:

'You're paying about \$[X]/month right now. Here's what that looks like after your system is live.'

Walk the value stack in this order:

1. Monthly bill savings — 'Your utility charge drops from \$[X] to roughly \$[Y].'
2. Loan payment (if financing) — 'Your loan payment is \$[Z]/month. Fixed. For 20 years. Your utility cannot raise that number.'
3. Net monthly difference — 'Day one, you're saving \$[difference]/month.'
4. SREC income — 'And on top of that, the state pays you \$[amount]/year for the clean energy you generate. That's a check, deposited to your account, every year.'
5. Upfront rebates / grants — 'Before you spend a dollar, [state program] gives you \$[X] back.'
6. 25-year savings total — 'Over the life of this system, here's what you save vs. staying on the utility. That's real money that stays in your family.'
7. Rate hedge — 'And notice this assumes rates stay flat. They haven't — and they won't.'

Reference the trifold sitting on the table:

'You've seen the company. You've seen the product. You've seen the warranty.

Now you see the numbers. Everything adds up.'

THE CLOSE



Closing with Q7

Reference their pre-close answer from Sit 1 directly:

'When we talked last time, you said if the numbers made complete sense, you'd be ready to move forward. Here are the numbers.'

Then ask directly:

'Based on everything we've been through — does this make sense for your family?'

STOP TALKING. The next person who speaks loses. Wait.

If YES: 'Great — let me walk you through the agreement.' Move to the contract.

If 'we need to think about it':

'Of course — what specifically is on your mind?'

Address that one thing right now. Surface it, answer it, ask again.

If they raise a concern covered in the trifold:

Pick it up and open to that exact page. 'Let me show you that one more time.'

Visual proof closes what words can't — and you left it on the table for exactly this.



Sit 2 Hard Rules

Never do Sit 2 without all decision-makers present. Reschedule — do not present to one half.

Always bring the printed trifold — not just a tablet. Physical material builds a different kind of trust.

Always make the pivot after Aurora Slide 2: 'Before we go any further — let me tell you about our company.'

Leave the trifold on the table after Act 2. It stays visible as a trust anchor through the numbers.

Reference Sit 1 answers throughout — every callback shows you listened and earns you credibility.

After any close (or non-close): referral ask. 'Who else do you know who'd want to see this?'

Log everything in CRM same day: outcome, next steps, any Q7 objections still open.



Quick Reference — Both Tools

Solar Guide sections. Trifold pages. The 3-act Aurora flow. All in one place.

Solar Guide — Section-by-Section Reference

Section	Tool Purpose	Rep Action	Key Output for Sit 2
Customer Details	Capture contact info	Fill in together at the start	CRM entry; confirms they're engaged
Discovery — Checkboxes	Residence history, tenure, roof age, aesthetics	Check boxes as they answer	Ownership vs TPO; roof flag; panel/racking recommendation
Walk-Around / Site Analysis	Technical site assessment	Walk the home together; photograph panel and roof	Design notes; MPU flag; shading notes; equipment recommendation
Needs Analysis Q1–Q7	Deep discovery and objection pre-load	Ask all 7; listen; take notes	Motivation frame for Sit 2; objection list; decision-makers identified
Discovery — Utility Bill	Establish rate crisis baseline	Review their actual bill together	Anchor number for all savings math in Sit 2 proposal
Discovery — Needs	Future load: EV, pool, electrification	Checkboxes + notes	System sizing guidance; upsell openings for Sit 2
Discovery — Backup	Battery need and critical loads	Yes/No questions + critical load notes	Battery conversation in Sit 2; whole-home vs. essential scope
Discovery — Financial	Finance path and credit qualification	Checkbox + strong credit question	Finance partner selection before Sit 2 proposal build
Follow-Up Appointment	Book Sit 2 before leaving	Confirm date, time, all decision-makers	Non-negotiable — never leave Sit 1 without this

Sit 2 — The 3-Act Flow at a Glance

Act	Tool	Trigger / What You Say	Purpose
ACT 1	Aurora — Slide 1 (Usage & 25-yr growth)	Open the appointment here after warm-up. 'Here's your home right now.'	Ground the conversation in their actual situation before anything else
ACT 1	Aurora — Slide 2 (Design on home)	'And here's your home.' Pause. Let them look. Walk the panel layout.	Make the system real and personal — excitement before trust
THE PIVOT	Set tablet down. Pick up trifold.	'Before we go any further — let me tell you a little bit about our company.'	Rebuild rapport; establish company credibility before showing price
ACT 2	Trifold — all 6 pages	Walk each page. Reference Sit 1 answers throughout.	Company trust + product knowledge + warranty = customer is ready for numbers



THE RETURN	Pick tablet back up. Trifold stays on table.	'OK — now let's get to the good stuff. The numbers.'	Return to Aurora warm; trifold left visible as a trust anchor
ACT 3	Aurora — Financials	Lead with their bill. Walk savings → SREC → finance → rate hedge → 25-yr total.	The close — Q7 reference + ask + silence

Trifold — Page-by-Page Reference

Trifold Page	Primary Job	Connect to Sit 1 If...	Leave-Behind Value
Front Cover (Go Solar)	Set tone: warm, credible, unhurried	Always — reconnects to Sit 1 relationship	Sets the frame; Bryan G. review as social proof
Go Solar (Company + accreditations)	Establish trust; pre-empt company objection	Q3: 'bad experience with another company'	BBB A+, Google 5.0, NABCEP, SolarInsure, CT Green Bank
Highest Efficiency (Panels, cell tech, inverters)	Justify premium; connect to Aurora design	Q4 aesthetics 'very important'; battery future	All-black panel visual; 60% more lifetime energy chart
Installation Matters (Anatomy + IronRidge HUG)	Eliminate roof damage fear; validate Aurora design	Q7: roof damage / leaks concern	IronRidge HUG seal diagram; 5-component system photo
Accessories (Battery, App, EV)	Open upsell; connect to Discovery Backup section	Power outages: yes; EV: yes/unsure	Battery, monitoring app, EV charger — only present if relevant
Quality Is Our Mission (Warranty + craftsmanship)	Final trust close — last thing before Aurora numbers	Any hesitancy about long-term commitment	25/30-yr warranty; leave on table through Act 3

The 7 Discovery Questions — At a Glance

#	Question (condensed)	Primary Use in Sit 2
Q1	What first made you interested in solar?	Sets the lead frame: financial stack vs. identity/green vs. rate protection
Q2	Avg. monthly bill? Swing seasonally?	Anchors every savings number in the proposal
Q3	Looked into solar before? What stopped you?	Addressed head-on in Sit 2 with trifold proof; never surprised by it
Q4	How long do you plan to stay?	Ownership vs. TPO; payback math; home value story
Q5	Does environmental footprint matter?	Calibrates green language: full / partial / none in Sit 2
Q6	Who else is part of this decision?	Ensures ALL decision-makers are in the room for Sit 2
Q7	If numbers make sense, anything else holding you back?	Your close setup — referenced directly when you ask for the contract

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