



# HELIO SOLAR

## New Sales Representative Training Guide

*Powered by the World's Best Sales Psychology*

**Grounded in:**

*Influence — Robert Cialdini*

*Pitch Anything — Oren Klaff*

*Never Split the Difference — Chris Voss*

*The Status Game — Will Storr*



# Welcome to Helio Solar

Congratulations on joining Helio Solar. You are entering one of the fastest-growing industries in the world, selling a product that genuinely improves people's lives, reduces their energy costs, and contributes to a cleaner planet. That combination — real value plus real mission — gives you an enormous advantage.

But passion alone doesn't close deals. This guide will arm you with a proven, psychology-backed sales framework drawn from four of the most powerful books ever written on human influence and persuasion. Learn this system, practice it daily, and you will not just meet quota — you will build a career.

## Your Mission at Helio Solar

Help homeowners and businesses make the single best financial and environmental decision of their lives: switching to solar energy. Every objection you overcome, every proposal you close, is a win for your customer, your company, and the planet.

## How to Use This Guide

This guide is structured in five parts, each building on the last. Work through them in order on your first read, then use the individual sections as reference material during your first 90 days in the field.

- Part 1 — The Solar Opportunity: what you're selling and why it matters
- Part 2 — The Psychology of Yes: Cialdini's six principles applied to solar
- Part 3 — Pitching Like a Pro: Klaff's STRONG method for commanding the room
- Part 4 — Status & Trust: using Will Storr's status game to win over any homeowner
- Part 5 — Negotiation & Closing: Voss's tactical empathy techniques to seal the deal



## PART ONE

# The Solar Opportunity

## Why Solar, Why Now

The US residential solar market has grown over 40% annually for the past decade. Electricity rates are rising in nearly every state. Federal tax incentives remain strong. And perhaps most importantly, consumers are increasingly motivated by both financial savings and environmental values. You are not selling a luxury — you are solving a real, recurring problem: the monthly utility bill.

### The Financial Case

Average homeowners save \$10,000–\$30,000 over a 25-year solar system lifetime. Most systems pay back in 6–10 years and generate free electricity for 15+ years beyond that. Financing structure determines tax credit eligibility — an important conversation to have early.

### The Environmental Case

A typical residential solar system offsets 3–4 tons of CO<sub>2</sub> per year — equivalent to planting 100 trees annually. Customers increasingly want to align their spending with their values. Solar lets them do both simultaneously.

## What You're Actually Selling

New reps often make the mistake of selling panels. You are not selling panels. You are selling:

- Financial certainty — replacing a variable, rising utility bill with a fixed, predictable payment
- Energy independence — freedom from utility companies and grid volatility
- Home equity — solar increases average home value by 4% according to Zillow research
- Status and identity — being the kind of person who invests in smart, forward-thinking solutions
- Legacy — a tangible contribution to a better world for their children

### Rep Mindset Shift

Every time you feel hesitant to follow up or push for the close, remember: you are not asking for a favor. You are offering someone a life-improving financial product. Hesitation doesn't serve your customer — it costs them.



## Know Your Products

You must be fluent in Helio Solar's product portfolio before your first appointment. Customers will test your knowledge — and nothing kills rapport and authority faster than being caught off guard on a technical question.

At minimum, be able to speak confidently about: panel efficiency ratings and what they mean in real terms, inverter types (string vs. microinverters) and their trade-offs, battery storage options and their value proposition, monitoring apps and how customers track their system, the installation process and timeline, and warranty and service guarantees.

### Study Tip

Shadow your first three installations before going solo in the field. Ask the install team questions. Customers will ask you everything they asked the installer — and you need the same answers.

## The Tax Credit: What Every Rep Must Know

This is one of the most important product knowledge points at Helio Solar. Getting it wrong will cost you deals and expose the company to liability. Learn it cold.

### Critical Policy Update — Know This Before Your First Appointment

The federal 30% Investment Tax Credit (ITC) has been completely eliminated for customers who purchase their system with cash or take out a loan. Customers using these payment methods are NO LONGER eligible for the federal tax credit.

However, customers who choose a Lease or Power Purchase Agreement (PPA) still benefit — indirectly but meaningfully. When a customer leases or enters a PPA, Helio Solar retains ownership of the system. As the owner, Helio Solar claims the 30% ITC. This tax benefit is then passed through to the customer in the form of lower monthly lease or PPA rates. The customer does not receive the credit directly, but they receive the financial benefit through reduced pricing.

#### Cash or Loan Purchase

Customer owns the system outright. No federal 30% ITC available. Customer benefits from full system ownership, net metering credits, and home equity increase. Best for customers who want asset ownership and have the capital or creditworthiness.

#### Lease or PPA

Helio Solar owns the system. Company claims the 30% ITC and passes savings to customer through lower rates. Customer pays a reduced monthly amount with no upfront cost. Best for customers who want low or no upfront investment and a predictable monthly bill.

## How to Handle This Conversation



Never hide this or steer a customer toward a product without explaining the difference. Your job is to inform clearly and let the customer choose. Transparency here builds trust — and a customer who feels misled will cancel, complain, and tell their neighbors.

### Tax Credit Conversation Script

"Great question on the tax credit — I want to make sure you have the full picture because it's changed. The 30% federal ITC is no longer available for customers who buy with cash or a loan. However, if you go the lease or PPA route, we as the company claim that credit and pass the savings to you through your monthly rate — so you're still getting the benefit, just structured differently. Let me show you both options side by side so you can decide what fits best."

### Closing Opportunity

The lease/PPA conversation is not a setback — it can be a closing tool. For customers hesitant about upfront cost, learning that a no-money-down option exists with built-in savings from the ITC pass-through often resolves hesitation entirely. Present both products with equal confidence.

## PART TWO

# The Psychology of Yes

*Based on Influence by Robert Cialdini*

Robert Cialdini spent decades studying what causes people to say yes. His research identified six universal principles of influence — not manipulation tactics, but deeply wired psychological triggers that shape every human decision. Master these and you will understand your customers better than they understand themselves.

## Principle 1: Reciprocity

*"People are obligated to give back to others the form of behavior, gift, or service that they have received." — Robert Cialdini*

When you give something first — genuinely and without strings — people feel a natural desire to reciprocate. In solar sales, this means leading with value, not with your pitch.

### How to Apply at Helio Solar

- Conduct a free energy audit before any pitch. Show customers their actual usage data, peak hours, and waste. This service has real value — you're not just running numbers, you're educating them.
- Bring a personalized savings analysis to every appointment. Not a generic brochure — a real projection for their specific home, based on their address and utility bill.
- Send a useful follow-up resource after every meeting, even if they didn't buy. A guide to solar incentives in their state costs you nothing and keeps you top of mind as a helpful expert.

### Script: Opening with Reciprocity

"Before I tell you anything about Helio Solar, I'd like to show you something we put together specifically for your home. Based on your address and average utility costs in your area, here's what your energy picture looks like today — and what it could look like in 12 months. There's no obligation here — I just want you to have this information."

## Principle 2: Commitment & Consistency

*"Once we have made a choice or taken a stand, we will encounter personal and interpersonal pressure to behave consistently with that commitment." — Robert Cialdini*



People like to act in ways consistent with their prior statements and commitments. Small yeses lead to big yeses. Your job is to secure micro-commitments throughout the sales process that build toward a natural close.

### How to Apply at Helio Solar

- Ask values questions early: "Is reducing your carbon footprint something that's important to your family?" When they say yes, you've created a commitment you can return to.
- Use progressive commitment: after explaining savings, ask "Does saving \$180 a month sound like something that would make a meaningful difference for you?" A yes here makes the close inevitable.
- Get verbal commitments on timeline: "If the numbers work the way I'm showing you, is there any reason you wouldn't want to get started before the end of the month?"

### The Consistency Ladder

Think of every question as a rung on a ladder. By the time you present the proposal, your customer should have said yes to: saving money, the environment, their home's value, going solar in principle, and your timeline. The close is just the final rung.

## Principle 3: Social Proof

*"We view a behavior as more correct in a given situation to the degree that we see others performing it." — Robert Cialdini*

Customers are uncertain about solar. They don't want to be the guinea pig. Social proof removes uncertainty by showing them that people just like them have already made this decision — and are thrilled with it.

### How to Apply at Helio Solar

- Know your neighborhood data. "We've actually installed systems on seven homes within a half mile of here in the last 18 months." This is hyper-local social proof — enormously powerful.
- Lead with relevant testimonials. Match the story to the customer: young family? Share a young family testimonial. Retired couple? Find that story. The more they identify, the more persuasive.
- Mention adoption trends: "In your zip code, solar adoption has tripled in three years. A lot of your neighbors have already made this move."
- Use referrals aggressively. A neighbor referring you is the single most powerful social proof available. Build a referral program into every close.



### Pro Tip: The Neighborhood Map

Keep a printed or digital map showing every Helio installation in the prospect's area. Show it during your appointment. Seeing their neighborhood lit up with solar homes is one of the most compelling visuals you can use.

## Principle 4: Authority

*"We are trained from birth to believe that obedience to proper authority is right."*  
— Robert Cialdini

Customers are making a significant financial decision. They need to trust you as an expert, not just a salesperson. Authority is built through credentials, expertise, and how you carry yourself from the first moment.

### How to Apply at Helio Solar

- Know your certifications. Be familiar with NABCEP certification, UL listings, and relevant state licensing. Mention them naturally — not as a recitation, but as part of your explanation.
- Use precise language. Experts say specific things. "Most systems" sounds salesy. "A 7.4kW system on a south-facing roof at your latitude will typically produce around 9,200 kWh annually" sounds like an expert.
- Dress and present professionally. Authority is conveyed before you speak — through appearance, materials, and punctuality.
- Reference third-party validators: ENERGY STAR ratings, DOE data, state utility commission reports. These signal that your claims have outside support.

## Principle 5: Liking

*"We most prefer to say yes to the requests of someone we know and like."* —  
Robert Cialdini

This seems obvious, but most salespeople underestimate how much likability matters — and how deliberately it can be cultivated. People buy from people they like. Full stop.

### How to Apply at Helio Solar

- Find genuine common ground before you pitch anything. Notice something about their home, their kids' photos, the car in the driveway. Find a real point of connection and spend time there.
- Mirror their communication style. High-energy customers get matched energy. Quiet, analytical customers get a slower, more data-driven approach. Inflexibility here costs deals.



- Compliment their skepticism: "I actually respect that you're asking hard questions — most people don't." This makes them feel good and reduces adversarial tension.
- Remember names — and use them. Not excessively, but enough to signal that this is a real conversation, not a script.

## Principle 6: Scarcity

| *"The way to love anything is to realize that it might be lost."* — Robert Cialdini

People value what they might lose more than what they might gain. Scarcity in solar selling is real — not manufactured. Tax incentives have step-down schedules, installation slots fill up, and utility rates change. Your job is to make sure customers understand genuine time sensitivity.

### How to Apply at Helio Solar

- Be clear about the ITC: "The 30% federal tax credit is only available on lease and PPA options now — customers who buy with cash or a loan no longer qualify. If you're considering a purchase, that's a real reason to look closely at the lease path before rates or policies shift further."
- Use honest installation capacity: "We're booking about three weeks out right now, and summer is our busiest season. If you want to have your system running before peak cooling season, we'd want to get your paperwork in by [date]."
- Net metering policies are changing in multiple states — homeowners who lock in today are grandfathered under more favorable terms in several markets.
- Never fabricate scarcity. Fake urgency destroys trust permanently if discovered — and customers will find out. All scarcity you use must be real.

### Cialdini Summary: The Six Levers

Reciprocity: give value first. Commitment: get small yeses. Social Proof: show who's already doing it. Authority: be the expert. Liking: be genuinely interested in them. Scarcity: make real deadlines real. Apply all six in every appointment and you will be in the top 10% of salespeople in any industry.



## PART THREE

# Pitching Like a Pro

*Based on Pitch Anything by Oren Klaff*

Oren Klaff's framework comes from neuroscience: the human brain has three distinct processing layers, and most salespeople pitch to the wrong one. Understanding how the brain evaluates information — and structuring your pitch accordingly — is the difference between being heard and being dismissed.

## The Three-Brain Framework

Every message you deliver is processed by three evolutionary layers of the brain:

### The Croc Brain (Primitive)

The oldest layer. Handles survival, threat detection, and basic impulses. This is the gatekeeper. If your pitch triggers boredom, confusion, or threat, it never reaches the higher brain. Most salespeople never get past this layer.

### The Neocortex (Rational)

The newest layer. Handles logic, analysis, and complex reasoning. This is where you want your pitch to land — where customers evaluate ROI, weigh options, and make decisions. But you can only get here after passing the croc brain.

The croc brain responds to: novelty (not boredom), contrast (not sameness), visual/concrete ideas (not abstractions), and emotion (not data dumps). Your entire pitch must be designed to pass this filter before it earns the right to be evaluated logically.

## The STRONG Method

Klaff's STRONG method provides a six-step structure for any pitch. Here's how to apply it to a Helio Solar appointment:

### S — Set the Frame

Whoever sets the frame controls the interaction. A frame is the context and perspective through which the entire conversation is interpreted. Most salespeople walk in as supplicants. Walk in as an expert with a valuable, time-limited opportunity.

### Frame-Setting Script

"Thanks for making time today. Here's what I'd like to do: I'm going to spend about 20 minutes showing you a financial analysis we put together for your home specifically. If the numbers make sense, we can talk about next steps. If they don't, we'll shake hands and I'll leave you with a resource on solar incentives in your state. Sound fair?"



This frame accomplishes several things: it's time-bounded (respects their time), positions you as the analyst not the vendor, and suggests you might determine they're not a fit — flipping the power dynamic in your favor.

## T — Tell the Story

Before presenting your solution, tell a story that creates a problem-tension arc. The best stories follow this structure: a world before solar, an inciting discovery (rising utility costs, environmental awareness, a neighbor's system), and the transformation available to them now.

Example: "When the Martinez family over on Cedar Street first called us, they'd just gotten a \$380 summer bill. They'd been putting solar off for three years — it felt complicated, expensive, risky. Eight months after installation, their average monthly bill is \$31. They told me it's one of the best financial decisions they've ever made."

A story activates the brain's pattern-matching system. Your customer's brain immediately asks: "Could this be my story?" That question is engagement — and engagement is the soil that decisions grow in.

## R — Reveal the Intrigue

Klaff calls this "The Why Now." You need a reason beyond product features that creates urgency and curiosity. In solar, you have several legitimate intrigue points:

- Net metering policies are changing in multiple states — homeowners who lock in today get grandfathered under more favorable terms
- Battery storage technology is advancing rapidly, and customers who install now can upgrade more easily than those who wait
- Utility companies are lobbying to reduce solar buyback rates — the economics are best for early adopters
- The federal tax credit is strong today but has been subject to legislative change historically

### Intrigue vs. Fear

There is a fine line between legitimate intrigue and fear-mongering. Intrigue says "here is something interesting and time-sensitive you should know about." Fear-mongering is pressure and manipulation. Stay firmly on the intrigue side — your credibility depends on it.

## O — Offer the Prize

Now — and only now — present your solution. You've set the frame, told the story, and created intrigue. The customer's brain is primed to evaluate your offer. Present your proposal as a prize, not a plea.



Language matters enormously here. Compare:

#### **Weak (Supplicant Frame)**

"I'd love to offer you this system if you're interested. We can definitely work with your budget. What do you think?"

#### **Strong (Prize Frame)**

"Based on your home's profile, you're an excellent candidate for a system that would eliminate your utility bill and generate a 12% annual return. Here's what that looks like."

The prize frame is not arrogance — it's confidence grounded in genuine value. Your system IS excellent. The math DOES work in their favor. Present it that way.

## **N — Nail the Hookpoint**

The hookpoint is the moment when customer interest converts to desire. It's your one-line value summary that should produce an immediate, instinctive reaction. For Helio Solar, your hookpoint should combine financial return, simplicity, and risk reduction.

#### **Example Hookpoints**

"Here's the bottom line: you're currently paying \$2,400 a year to your utility company for power you could be generating yourself, for free, from your own roof — starting this year."

#### **Example Hookpoints**

"Your neighbors are essentially getting paid to go solar through tax credits and net metering. You're funding the grid for free right now."

Find two or three hookpoints that feel natural to your voice and practice them until they're effortless.

## **G — Get the Decision**

Close with a simple, direct ask. Many reps become vague and hesitant at this moment, sensing resistance and retreating. Don't. A clear ask is a gift to a customer who has been nodding along with you.

"Based on everything we've covered today, I'd like to get your installation scheduled before the end of the month so you can take advantage of current incentive levels. Can we move forward?"

If they pause or hedge, that's a buying signal — not a rejection. Hesitation means they're interested but haven't resolved a concern. Your job is to find and solve the concern, not retreat from the close.



## PART FOUR

# Status, Identity & Trust

*Based on The Status Game by Will Storr*

Will Storr's research reveals that human behavior is far more driven by status — our position in social hierarchies — than we typically acknowledge. Status isn't about money or titles. It's about how we are perceived and how we perceive ourselves. Understanding the status dynamics in every sales conversation will transform how you connect with prospects.

## The Three Status Games

Storr identifies three types of status games that humans play:

- Dominance: achieved through strength, intimidation, or demonstrated competence
- Virtue: achieved through moral behavior, being a good person, living by shared values
- Success: achieved through accomplishment, wealth, innovation, being recognized as capable and forward-thinking

Solar buyers are almost never in a dominance game. They are typically playing a virtue game ("I want to do right by the environment and my family") or a success game ("I want to make smart financial decisions and be ahead of the curve"). Your pitch must speak to the game they're actually playing.

## Selling to the Virtue Player

Virtue players are motivated by values and identity. They need to see solar not just as a financial transaction but as an expression of who they are. For them, going solar is an act of care for the next generation, community responsibility, and alignment between spending and values.

### Language for Virtue Players

- "A lot of our customers tell us the financial savings are great, but what really made the decision easy was knowing their home was producing clean energy for their kids."
- "You'd be joining thousands of homeowners in this area who've made the commitment to reduce their household's carbon footprint."
- "Your system will offset the equivalent of planting about 100 trees every year — every year it runs."

## Selling to the Success Player



Success players are motivated by being recognized as smart, capable, and ahead of the curve. They're early adopters, they hate being late to trends, and they want others to see them as forward-thinking decision-makers. For them, solar is an investment with measurable returns and a competitive edge.

## Language for Success Players

- "Homeowners who went solar five years ago are looking at returns that beat most stock portfolios on a risk-adjusted basis."
- "The smart money in residential real estate has been adding solar for a decade. Zillow data shows a consistent 4% value premium for solar homes."
- "You'd be locking in today's energy rates while your neighbors keep absorbing utility increases for the next 25 years."

## Your Own Status: The Expert Advisor

As a salesperson, your status in the interaction profoundly affects the outcome. Walk in as a supplicant ("I really hope they buy") and customers will sense it — and discount everything you say. Walk in as an expert advisor whose time is valuable and whose recommendations are authoritative, and customers will naturally defer to your judgment.

This is not about ego. It's about serving your customer well. A doctor who is uncertain about their diagnosis doesn't help their patient. An expert who knows the answer and communicates it clearly does. You are that expert.

### Status Exercise

Before every appointment, spend 60 seconds reminding yourself: I have helped families save tens of thousands of dollars. I know this product and this industry cold. This customer's energy situation could genuinely be improved by this conversation. I am not here to beg — I am here to help. Walk in from that place.

## Status Threat: When Customers Push Back

Many customer objections are not really about the product — they are status moves. When a customer says "I need to think about it" or "I've heard solar companies are pushy," they are often protecting their status by not being seen as easy marks.

The worst response to a status threat is to become more aggressive or more obsequious. Both responses lower your status and reduce trust. Instead, validate the move and reframe:

- "Absolutely — I wouldn't expect you to make a decision like this on the spot. Can I ask what specific piece of information would make this clearer for you?"



- "That's a fair reputation for some companies. Ours is built entirely on referrals — which means if we pushed people, we'd be out of business pretty fast."
- "Smart to be cautious. What I'd suggest is this — let me show you exactly how we structure the numbers and you can verify them independently."

### The Status Principle

In every customer interaction, your goal is a relationship where both of you hold high status. You are the expert. They are the discerning, intelligent buyer. Nobody is beneath anyone. The best solar deals feel like two smart people solving a problem together.

## PART FIVE

# Negotiation & Closing

*Based on Never Split the Difference by Chris Voss*

Chris Voss spent two decades as the FBI's lead hostage negotiator. His core insight: negotiation is not a battle of logic — it's a management of emotions and perception. When you understand what's driving a customer's hesitation and make them feel genuinely heard, they become collaborative rather than adversarial. That's when deals close.

## Tactical Empathy

Tactical empathy is the foundation of Voss's method. It means identifying and acknowledging how the other person feels — not just what they think. Customers who feel heard become open; customers who feel processed become defensive.

Tactical empathy is not: saying "I understand how you feel" (empty and patronizing). It IS: demonstrating that you specifically understand their specific situation and concerns.

### Tactical Empathy Script

"It sounds like you've heard a lot of conflicting information about solar, and you're not sure who to trust. That makes total sense — this industry has some bad actors and a lot of noise. Can I show you exactly how we document everything we're promising, so you can verify it independently?"

## Labeling

Labeling is naming what you observe about the other person's emotional state. It is one of the most powerful rapport-building techniques available. When you accurately name what someone is feeling, their nervous system relaxes — they feel understood, not managed.

### Labeling Formula

"It seems like..." / "It sounds like..." / "It feels like..." + [the emotion you're observing]

- "It seems like you've been burned by a home improvement contract before and you want to make sure the numbers are locked in."
- "It sounds like the upfront cost is the main thing standing in the way."
- "It feels like you're interested, but something is still holding you back — and I'd rather know what it is than guess."

After a label, stay silent. Let the customer respond. You have just opened a door — don't close it by talking over the answer.

## The Accusation Audit

An accusation audit is disarming: you proactively name every negative thing the customer might be thinking about you or your company before they say it. This technique de-escalates defensiveness instantly.

### Accusation Audit Script

"I want to be upfront about a few things. You've probably heard that some solar companies are pushy, that the savings projections are sometimes inflated, and that installation doesn't always go as smoothly as promised. I can't speak for every company — but I can tell you exactly how we handle each of those, and you can hold us to it."

Naming every objection before the customer raises it accomplishes two things: it disarms their defenses, and it signals enormous confidence in your product. Someone who is afraid of objections doesn't invite them proactively.

## Calibrated Questions

Calibrated questions start with "How" or "What" — never "Why" (which sounds accusatory). They invite the other person to think, engage, and often solve their own objections. They keep you in information-gathering mode rather than defensiveness mode.

### Essential Calibrated Questions for Solar Sales

- "What would make this decision easy for you?" — identifies the actual decision criteria
- "How does your spouse typically approach decisions like this?" — surfaces the influencer you need to include
- "What would it take to move forward before the end of the month?" — surfaces real objections without a yes/no confrontation
- "How would you feel about your energy bill being completely predictable for the next 25 years?" — activates imagination and desire
- "What's your biggest concern about moving forward today?" — invites the real objection into the open where you can address it

## Mirroring

Mirroring is the simplest technique in Voss's toolkit and one of the most effective. When someone says something that needs exploration, repeat the last three words (or the most significant three words) back to them as a question. Then wait.

**Customer Says**

"We're just not sure about the financing."

**You Mirror**

"Not sure about the financing?" [then wait silently for 3-5 seconds]

The silence after a mirror feels uncomfortable — but it's the customer's turn. They will almost always fill it with exactly the information you need. Mirroring works because it signals that you're listening carefully, it avoids presuming what they mean, and it pulls elaboration without interrogating.

## The "That's Right" Moment

Voss's book describes the goal of any negotiation as reaching the moment when the other person says "That's right" — not "You're right." The difference is enormous.

"You're right" is a surrender to end the conversation. "That's right" is a recognition that you have perfectly understood their situation. When a customer says "That's right," their defenses are down, their trust is high, and the deal is close.

To get to "That's right," summarize their situation back to them in better language than they used. Show them you understand not just their words, but their underlying concerns and desires.

**Reaching "That's Right"**

"Let me make sure I've got this right. You're interested in solar, the numbers make sense to you, but you've had contractors overpromise before and you need confidence that what we're showing you is what you'll actually get — no surprises. Is that accurate?" [They say: "Yeah, that's exactly right."] You are now closing a deal, not fighting a battle.

## Handling the Most Common Objections

**"The price is too high."**

Don't drop price immediately — that signals that your original price was inflated. Instead, label the concern and reframe to value:

"It sounds like you're weighing the upfront investment against the long-term return. Let's look at this month by month — because over the life of the system, you're not spending money, you're moving money from your utility company to your own asset. What part of the math would be helpful to walk through together?"



## "I need to talk to my spouse."

Validate and include:

"Absolutely — a decision like this should be made together. What's the best way to get them on a call or in the room? I'd hate for you to have to translate all the detail — let's just make sure they have the same information you do."

## "Let me think about it."

This is usually not a no — it's an unarticulated concern. Label it:

"Of course. It seems like there's something specific that's still not sitting right, and I'd rather you tell me than guess. What is it that's making you want more time?"

## "I've seen bad reviews of solar companies."

Use the accusation audit:

"That's a completely fair concern — there are companies in this space that have overpromised and underdelivered. I'd actually encourage you to check our reviews on Google and the BBB. We built this company on referrals, which means if we don't do exactly what we promise, we don't get more customers. Can I show you our installation guarantee in writing?"



## PART SIX

# The Helio Solar Two-Sit Close

Everything in this guide comes together in Helio Solar's proven sales process: the Two-Sit Close. Unlike single-visit selling — where reps rush discovery, pitch, and close in one overwhelming session — the Two-Sit Close separates the process into two distinct, purposeful appointments. The result is higher trust, better-prepared customers, and significantly higher close rates.

### Why Two Sits Work

Customers who feel rushed make no decision. Customers who feel educated and respected make confident decisions. The Two-Sit Close uses the first appointment to build the relationship and gather intelligence, and the second appointment to deliver a proposal so tailored to their specific concerns that the close feels inevitable — not pressured.

## Sit One: Discovery with the Solar Guide

### Purpose

The entire purpose of Sit One is to listen. You are not pitching a system. You are not showing numbers. You are using Helio Solar's Solar Guide as a structured conversation tool to understand this household's unique energy situation, values, concerns, and decision-making dynamics. Everything you learn here becomes ammunition for a devastating, perfectly tailored Sit Two.

### The Solar Guide: Your Discovery Framework

The Solar Guide is not a brochure — it is a conversation map. Work through it with the customer, asking questions and recording their answers. The guide covers the key areas below, and your job is to draw out responses that reveal both rational concerns and emotional motivations.

#### Solar Guide Discovery Areas

Current energy costs and usage patterns. Utility bill history and pain points. How long they plan to stay in the home. Prior knowledge or experience with solar. Environmental values and motivations.

#### Solar Guide Discovery Areas (cont.)

Financial priorities: ownership vs. low monthly payment. Concerns or hesitations about solar. Who else is involved in the decision. Timeline for making a decision. What would make this an easy yes.

As you work through the Solar Guide, you are simultaneously deploying Voss's tactical empathy — labeling what you hear, mirroring to draw out more detail, and listening for the concerns and desires that will shape your Sit Two proposal.



## Rep Mindset for Sit One

Your only job in Sit One is to become the most knowledgeable person alive about this specific household's solar situation and decision. The more you learn here, the more effortless Sit Two becomes. Reps who rush Sit One to get to the pitch are leaving deals on the table.

## Key Questions to Ask During Discovery

- "What first made you interested in looking at solar?" — reveals their primary motivation (virtue vs. success game)
- "What's your current monthly electricity bill, on average? Does it swing a lot seasonally?" — establishes the baseline financial case
- "Have you looked into solar before? What stopped you?" — surfaces pre-existing objections you must address in Sit Two
- "How long do you plan to stay in this home?" — determines payback math and whether ownership or lease makes more sense
- "Is reducing your environmental footprint something that matters to your household?" — commitment trigger and status game identifier
- "When it comes to a decision like this, who else is typically part of the conversation?" — identifies decision makers for Sit Two
- "If the numbers make complete sense, is there anything else that would hold you back from moving forward?" — pre-surfaces all objections

## Listening for Sit Two Ammunition

During Sit One, you are building a personal dossier on this customer. Every concern they raise is a problem you will solve in Sit Two. Every value they express is a hook you will use. Every hesitation they name is an objection you will dismantle before they raise it again. Take notes — visibly. Customers feel respected when they see you writing down what they say.

## The Accusation Audit Prep

After Sit One, write down every negative thing this customer said or implied about solar, about contractors, about cost, or about their own hesitancy. These become the opening of your Sit Two accusation audit — you will name every one of them before they can raise them, and then solve each one with your proposal.

## Closing Sit One: The Three Confirmations

The final five minutes of Sit One are as important as anything that came before. You must leave with three things locked in. Do not leave without all three.

## Confirmation 1: The Second Appointment Date and Time



Set the Sit Two appointment before you walk out the door. Do not say "I'll call you to schedule." That call will be screened, delayed, or never made. Pull out your calendar, propose two specific times, and get a commitment.

### Setting Sit Two Script

"Based on everything you've shared today, I'm going to put together a proposal that's built specifically around your home and your priorities. It typically takes me a day or two to pull everything together. Would [Day] at [Time] or [Day] at [Time] work better for you to sit down and go through the numbers?"

## Confirmation 2: All Decision Makers Present at Sit Two

This is non-negotiable. If the person who writes the check, or whose name is on the mortgage, or whose opinion carries the most weight is not in the room for Sit Two, your close rate drops dramatically. You cannot use Voss's "That's right" technique on someone who isn't there. You cannot address their specific concerns. And "I need to talk to my spouse" becomes an exit ramp.

### Decision Maker Script

"One thing I've found makes a huge difference — and this is for your benefit as much as anything — is having everyone who's part of this decision in the room when we go through the numbers. That way nobody has to relay information secondhand, and if there are questions, we can answer them live. Will [partner/spouse/co-owner] be available at that time?"

If they say no, do not accept it. Gently persist:

"I completely understand schedules are tough. Is there a time that works for both of you? I'm flexible — evenings and weekends work fine for me. I just want to make sure we're not wasting your time by having to do this twice."

## Confirmation 3: Their Key Concerns for Sit Two

Before you leave, summarize back what you heard as their main concerns or questions, and confirm you've captured them correctly. This does two powerful things: it activates Voss's "That's right" moment (building trust and closing the psychological loop), and it makes an implicit promise that your proposal will directly address each one.

### Concern Confirmation Script

"Before I go, let me make sure I've got this right. The things that are most important for me to address when I come back are: [1st concern], [2nd concern], and [3rd concern]. Is there anything else that would be helpful for me to work through? I want to make sure when we sit down again, everything you need to make a confident decision is right there in front of you." [Wait for: "Yeah, that's exactly right."]



When they say "that's right" or "yes, exactly" — you have just created a psychological contract. They are now expecting a proposal that solves their specific problems. Show up and deliver that, and the close is almost a formality.

## The Time Between Sits

The gap between Sit One and Sit Two is not downtime. It is preparation time. Use everything you learned in Sit One to build a proposal that speaks directly to this specific customer.

- Review your Solar Guide notes and identify the top 2-3 concerns to address in your opening accusation audit
- Identify which status game they're playing — virtue or success — and calibrate your language accordingly
- Prepare a side-by-side comparison of cash/loan vs. lease/PPA options, since the ITC question will almost certainly come up
- Pull your neighborhood social proof — nearby installations, local testimonials, neighbor data
- Prepare any specific numbers they asked about: payback period, monthly savings, system size

## Sit Two: The Proposal and Close

### Purpose

Sit Two is where you deliver. You have done the discovery, you know their concerns, you have all decision makers in the room, and you have built a proposal tailored to this household. This is not a generic presentation — it is a direct response to everything you heard in Sit One.

### Opening Sit Two: The Accusation Audit

Begin by naming every concern they raised in Sit One — before they raise them again. This disarms defensiveness instantly and signals that you were listening in your last visit.

#### Sit Two Opening Script

"Before I show you the numbers, I want to address a few things you brought up last time, because I built this proposal around them. You mentioned you'd had contractors overpromise before. You had questions about how the financing affects the tax credit. And you weren't sure whether ownership or a lease made more sense for your situation. I've covered all three of those directly in what I'm about to show you."

### Presenting the Proposal



Deploy Klaff's STRONG method here. Frame it as a prize, not a plea. Tell the story of their specific energy situation — what they told you last time — and show them the transformation. Use the hookpoint. Then present the numbers clearly, covering both ownership and lease/PPA options, and address the ITC question directly and transparently.

At this stage, Cialdini's consistency principle is working in your favor. They already said yes to saving money, yes to the environment, yes to making a smart financial decision. Your proposal is just the fulfillment of commitments they've already made.

### The Close

After presenting, do not hedge. Ask clearly. Use the commitment ladder they've been climbing since Sit One:

#### Sit Two Close Script

"Based on everything we talked about last time, and everything I've shown you today — this addresses [concern 1], [concern 2], and [concern 3], and the numbers work the way we discussed. I'd like to get you scheduled before [date] to lock in your installation slot and current rates. Can we move forward?"

If they hesitate, go back to Voss. Label the hesitation. Ask a calibrated question. Find the unresolved concern and solve it. Do not drop price as your first move — first find out what the real issue is.

## Your First 90 Days: Milestones

#### Days 1–30: Learn

Master product knowledge and the ITC policy. Shadow three installs. Practice the Solar Guide questions until they're conversational. Run your first 10 Sit Ones with a senior rep present. Focus on listening.

#### Days 31–60: Apply

Solo appointments begin. Focus entirely on Sit One quality — the better your discovery, the easier your close. Review every appointment within 24 hours. Practice labeling and mirroring daily.

#### Days 61–90: Optimize

Track your Sit One-to-Sit Two conversion (did you get the appointment?) and your Sit Two close rate separately. Identify where you're losing deals. Refine your accusation audit and concern confirmation scripts.

#### Day 90+: Systemize

Build your personal playbook. Start asking every close for a referral. Your goal: every Sit Two has all decision makers present, every proposal addresses their exact concerns, and closing feels like a natural conclusion.

## Quick Reference: Best Scripts by Situation



## Opening Sit One

"Before I tell you anything about Helio Solar, I'd love to learn about your energy situation specifically. I've got a guide here I like to walk through — it helps me make sure that if I come back with a proposal, it's actually built around what matters to you. Mind if we work through it together?"

## Building Social Proof

"We've done [X] installations within a mile of here. Let me show you where — [neighborhood map]. Your neighbors are already doing this."

## The Tax Credit Conversation

"The 30% ITC is no longer available for cash or loan purchases — but on a lease or PPA, we claim it and pass the savings to you in your monthly rate. Let me show you both options side by side."

## Setting Sit Two

"I'm going to build a proposal specifically around what you've told me today. Would [Day] at [Time] or [Day] at [Time] work to go through the numbers together?"

## Getting All Decision Makers

"Will [partner] be available at that time? I've found it makes a real difference to have everyone there so nothing gets lost in translation and all the questions get answered live."

## Confirming Concerns at End of Sit One

"Let me make sure I've captured this right — the main things you need me to address are [concern 1], [concern 2], and [concern 3]. Does that sound right?"

## Opening Sit Two

"You mentioned [concern 1], [concern 2], and [concern 3] last time — I built this proposal around all three. Let me show you."

## The Close

"The numbers address everything you brought up. I'd like to get your installation scheduled before [date] to lock in current rates. Can we move forward?"



## Asking for the Referral

"Is there anyone in your neighborhood or family who you think would benefit from a conversation like this? Our best customers usually come from people exactly like you."

### Final Word

The Two-Sit Close is not just a sales process — it is a philosophy. It says: I respect you enough to listen before I pitch. I know you well enough to solve your actual problems. And I am confident enough in this product to let the numbers speak for themselves. That is the kind of rep Helio Solar is building. Go be that person.

☀ **Welcome to the team.** ☀