

# Solar Consult Authority Kit

A starter kit for solar installers who want stronger qualification, more authoritative consult framing, and less proposal-stage leakage.

Solar owners, sales managers, setters, and design-call coordinators

## GUIDE

A starter kit for solar installers who want stronger qualification, more authoritative consult framing, and less proposal-stage leakage.

## WHAT THIS ASSET COVERS

- Solar Consult Qualification Playbook
- Solar Financing Trust Guide
- Home-Service Answer Map
- Trust-Signal Architecture Guide for Small Businesses
- Review Trust Governance Playbook
- Front Door Score Tool for Small Businesses

## SUGGESTED ROLLOUT

1. Tighten qualification so weak-fit consults stop crowding out better opportunities.
2. Use answer and trust assets to make the business look more advisory-led before the design call.
3. Improve proof and review systems so authority compounds alongside lead flow.
4. Track front-door readiness so setter speed and consult trust are measured together.

## WORKING ASSET

## INCLUDED ASSETS

- Solar Consult Qualification Playbook

- Home-Service Answer Map
- Trust-Signal Architecture Guide
- Review Trust Governance Playbook
- Front Door Score

## **PURPOSE**

Use this kit to make solar intake feel more consultative, more qualified, and more authority-led before the proposal stage.

## **ROLLOUT SEQUENCE**

1. tighten qualification
2. improve public answers and trust signals
3. standardize review and proof capture
4. measure front-door readiness monthly

## **KPI SET**

- consult show rate
- qualified consult rate
- proposal progression rate
- review capture rate

## **DEPLOYMENT NOTES**

### **HOW STRONG TEAMS ACTUALLY USE THIS ASSET**

- Assign one accountable owner instead of letting "Solar Consult Authority Kit" become shared but unmanaged work.
- Use it with solar owners, sales managers, setters, and design-call coordinators in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

### **30-DAY ROLLOUT SEQUENCE**

- Tighten qualification so weak-fit consults stop crowding out better opportunities.

- Use answer and trust assets to make the business look more advisory-led before the design call.
- Improve proof and review systems so authority compounds alongside lead flow.
- Track front-door readiness so setter speed and consult trust are measured together.

## **WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE**

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: Solar Consult Qualification Playbook, Solar Financing Trust Guide, Home-Service Answer Map, and more.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.