

Solar Consult Qualification Playbook

A consult qualification playbook for solar installers that want cleaner lead screening, stronger site-fit messaging, and fewer stalled opportunities between inquiry and design call.

Solar owners, setters, inside sales teams, and design-call coordinators

GUIDE

A consult qualification playbook for solar installers that want cleaner lead screening, stronger site-fit messaging, and fewer stalled opportunities between inquiry and design call.

WHAT THIS ASSET COVERS

- A qualification path for homeowner fit, property readiness, timeline, and financing signals
- Pre-consult language for roof condition, utility context, and installation expectations
- A cleaner handoff between lead source, setter, and design conversation

USE THIS WHEN

1. Too many solar inquiries look warm but never mature into productive consults
2. The setter or office team is spending too much time on weak-fit opportunities
3. The business wants a more premium discovery process that still moves quickly

WORKING ASSET

PURPOSE

Use this playbook to improve consult quality before the design conversation starts.

QUALIFICATION AREAS

- homeowner vs commercial decision-maker
- property type
- roof age / roof condition

- timeline to install
- financing posture
- utility concern
- battery interest

SETTER STANDARD

1. confirm the property and buyer fit
2. identify the timing driver
3. surface the roof or electrical constraint early
4. book only when the consult can advance meaningfully

PRE-CONSULT MESSAGE

“Before the design call, we want to make sure the property, timing, and project goals are a fit so the next conversation is worth your time.”

WEAK-FIT SIGNALS

- renter / no decision authority
- immediate quote shopping only
- unclear property ownership
- roof replacement conflict with no timeline

STRONG-FIT SIGNALS

- recent utility pain
- defined move timeline
- battery resilience concern
- roof and ownership clarity

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Solar Consult Qualification Playbook" become shared but unmanaged work.
- Use it with solar owners, setters, inside sales teams, 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.

BEST DEPLOYMENT SEQUENCE

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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: A qualification path for homeowner fit, property readiness, timeline, and financing signals, Pre-consult language for roof condition, utility context, and installation expectations, A cleaner handoff between lead source, setter, and design conversation.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.