

# SOLAR LEAD GENERATION

a Lower CPA ( Cost Per Acquisition)

Questions Answered

# Proposal for RGS

## What are your lead qualification criteria?

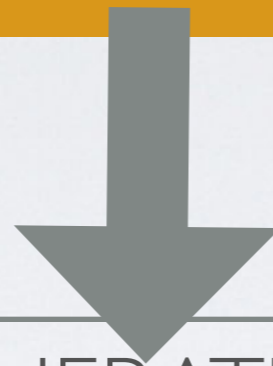
- Homeowner
- Single Family Residence
- Bills over \$150 a month
- No Bankruptcies, Foreclosures, Loan
- No excessive shading
- Scale 1-10 interest in solar
- No Modifications, Short Sales in the last 7 years
- Credit: 650 or better
- No Discounts with Energy Company
- Specific Utility Provider

Are we able to define additional criteria, such as utility provider, average electric bill size, credit score, etc.?



**YES!**

If your leads are derived from online sources, do you perform any additional validation before sending the leads to your clients (IE phone follow up)?



**YES** ,ALL INTERNET GENERATED LEADS COME WITH AN IP ADDRESS SO OUR CLIENTS CAN TEL THE HOMEOWNER WHERE THEY FILLED OUT THE FORM. **WE ALSO CALL THE WEB LEAD TO VERIFY THEIR DATA IS ACCURATE.**



How many solar installers do you sell your non-exclusive leads to?

WE ONLY OFFER  
EXCLUSIVE LEADS TO  
OUR CLIENTS



Have you worked with other solar installers in the past? If so, who and for how long? .

We have been in Solar since 2006. Working Directly for Companies Such as DRI ENERGY, ONEROOF ENERGY, SUN RUN,

**From:** David Field  
**Sent:** Friday, September 26, 2014 6:54 AM  
**To:** Phil Morgan  
**Cc:** Nick Hofer  
**Subject:** Today's Company Meeting

Hi Phil,

I was wondering if you could take 10 minutes today and present at our company meeting with regard to what you are doing on lead generation? You have been very successful in restructuring our cost basis around lead gen, and I would like you to share the results of your success with the entire company.

Please let me know your thoughts.

Thanks,

David

**David A. Field**  
President/CEO

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**OneRoof Energy, Inc.**

4445 Eastgate Mall Rd., Ste 240, San Diego, CA 92121

In which regions do you operate?

**WE OPERATE IN EVERY STATE IN THE UNITED STATES**

YES, You are able to define which zip codes you receive leads?

Describe your return policy

Please See Next 2 Pages On What Determines a Qualified Lead and  
Return Policy



“Lead Criteria” means a Lead that meets all of the following criteria:

- (a) the individual must be the owner of and be listed on title to the Site;
- (b) the individual must speak and write English;
- (c) neither the individual nor any person who is a co-owner or who is listed on title to the Site must have experienced any financial hardships in the past seven (7) years, such as bankruptcy, foreclosure, loan modification, or short sale;
- (d) the individual must not be a recipient of any benefits under the California Alternative Rates for Energy (aka CARE) program nor be a recipient of any medical discounts from their current electricity provider;
- (e) the individual must have good to excellent credit, with a FICO score of seven hundred (650) or higher;
- (f) the individual must be expressly informed by Marketer that information obtained from him or her shall be provided to ORE for the sole purpose of marketing and solicitation and shall not be obtained for any government program intended to reduce his or her electric bill; and
- (g) the individual must agree to, and be interested in, a home appointment with Client company sales representative.

Client company shall provide written notice to Marketer specifying any changes to the Lead Criteria set forth above, which may be made by Client company in its sole discretion from time to time.

“Market” means the ZIP codes and utility company or companies provided by Client company to Marketer from time to time.

“Qualified Individual” means an individual that satisfies all Lead Criteria based upon answers provided by such individual to Marketer or information obtained by Marketer, in each case, during the initial phone contact between Marketer and such individual.

“*Site*” means a single-family, owner-occupied residence that meets all of the following criteria:

(a) the residence must be a fixed-foundation, stand-alone property;

(a) the residence must be in a Market;

(a) the electric bill for the residence averages at least one hundred fifty dollars (\$125) over the 12-month period preceding the date on which information regarding the Qualified Individual is initially obtained;

(a) the utility provider of the residence must be approved by Client Company; and

(a) the residence must not have twenty percent (20%) or more shading on the roof, which would make it unsuitable for installation of a solar system.

“*Valid Lead*” shall contain all of the following information with respect to a Lead:

(a) the complete legal name, including first and last name, of a Qualified Individual;

(b) the primary phone number and e-mail address

(c) the address of the Site at which such Qualified Individual desires to install a solar system;

(d) the date and time of a home appointment, which shall be scheduled, with such Qualified Individual and a sales representative, not earlier than two (2) days before and not later than seven (7) days after the date on which Marketer provides such Lead to Client company



What are your accepted methods of payment?

PAYPAL  
CREDIT CARD  
BANK WIRE  
CHECK

Do you invoice monthly (pay by check) or require prepayment?

We require prepayment on 50% of the initial test order and then 30  
day net

This is what we generally track.

- Lead to appointment/proposal; Exclusive 27 – 37%
- Proposal to close; 30 – 50%



**LEAD PRICES**

**ALL LEADS ARE EXCLUSIVE**

## Webforms

Long Form **\$55** Short Form **\$25** Called Verified

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## Solar Call Backs

Home Owners Request Call Backs to Discuss Meeting With Solar Company **\$50**

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## Solar Appointments

**\$155**

American Call Center Generated Appointments With Qualification and Double Confirmation Process  
( We qualify, book appointment, confirm the appointment and then live transfer it to solar client to further confirm appointment and company introduction. All Calls are recorded)

**This is the highest converting solar lead..Decreases No Shows**

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## Solar Appointments

**\$110**

Call center generated. Calling off of aged solar data, qualification and single confirmation.

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## Canvassed Leads

**call for pricing**

available in certain markets



## **Our American Call Center Generated Solar Appointment**

We own and operate several robust call centers in Colorado Springs and Arizona.

We call on specialized solar data ( aged/propensity/real time). We qualify on specific criteria and we set the appointment with the homeowner. Once the appointment is set, we transfer the homeowner in real time to our scheduling department to further confirm the meeting. This confirmation process will dramatically decrease no-shows. All of our qualifying calls are recorded and we are TCPA compliant.

Please let me know if you have interest in working with these type of leads.

Phil Morgan  
760-402-0485  
[phil@positivephil.com](mailto:phil@positivephil.com)

Phil Morgan  
760-402-0485 (cell)  
888-385-6831 ( office )  
San Diego, CA

[www.positivephil.com](http://www.positivephil.com)  
[www.solarcanvassing.com](http://www.solarcanvassing.com)  
[www.solarlivetransfers.org](http://www.solarlivetransfers.org)