



# Leveraging Customer Check-Ins

Generating quality leads is essential to success in solar sales. The best leads often come from satisfied customers who were happy with both their purchase and the service provided by their salesperson. One of the most effective ways to create that lasting value is by staying engaged long after the sale is complete. This means implementing a consistent, well-timed check-in process with past customers. This document outlines best practices for checking in, ensuring customer satisfaction, delivering continued value, and ultimately, earning positive reviews and referrals.

---

## Implementing Customer Check-ins

When checking in with customers, there are a few guiding principles that will help you stand out as being truly concerned that they are satisfied with your services and their solar system:

- Always personalize your messages. Personalization drives better customer outcomes.
  - Use the customer's name
  - Speak to their system, its size, equipment, and any other notable tangibles
  - Include dates, such as the install, PTO, and anniversary dates
- Begin by being helpful—genuinely check in before asking for anything
  - Remind the customer of their goals and ask if they are realizing them
  - Provide helpful tips on monitoring, reading the bill, reducing electric usage
- Keep it short + friendly—respect their time
- Use multiple touchpoints
  - Email, text, phone—depending on what they prefer
  - Send a postcard that includes a review and/or referral request QR code
- Make it easy to refer family and friends
  - Include a referral link, QR code, or quick form
- Offer value
  - Provide quick, helpful tips on their system and energy savings
  - Offer to meet with them to answer questions, review their bill
  - Reminders of your referral program rewards is a great motivator
- Schedule regular check-in reminders on your calendar at 3, 6, 9 and 12 months.



THRYVE

## 30-Day Check-In

**Goal:** Check their system's status. Answer questions, provide helpful tips, and ensure satisfaction.

### Sample Message Questions and Tips:

- "How's your system performing so far?"
- "Have you received your first bill? If so, would you like to meet and review it together?"
- "Did you know that you can maximize your savings by using major appliances (dishwasher, laundry, EV charging) during peak solar hours (typically 10am–4pm). This helps you use more of your solar power in real time and rely less on the grid."
- "If you're happy with your solar system and me, would you mind reviewing us?" (Review link)
- "What do your neighbors and family think about your system?"

### Referral Prompt:

- "If anyone you know is curious about solar, we'd love to help them, too. Here's how you can refer someone (plus you get [reward] if they go solar)." (Review link)

### Sample Template:

**Subject:** Your First 30 Days with Solar!

Hello, John!

You've officially wrapped up your *first month* of going solar—congrats! Have you started noticing the benefits of your Mission panels yet? Got your first bill? If it's in your inbox and looking a little mysterious, I'd be happy to walk through it with you—just say the word!

**Sunny Tip:** Want to squeeze the most savings from your system? Try running big energy users (like your dishwasher, laundry, or EV charging) between 10am and 4pm—aka, your solar sweet spot. That way, you're using more of your own sunshine power instead of the grid's.

**P.S. Our referral program is glowing:** Send a friend our way and you'll *both* earn **\$500** if they go solar. [Click here to refer someone →]

I'll check in again in 60 days, but if you need anything before then, I'm just a message away.

Thanks again for choosing us!

Jedediah Smith

ABC Solar



THRYVE

## 3-Month Check-In

**Goal:** Reaffirm the value of their solar system. Answer questions, provide helpful tips, and ensure satisfaction.

### Sample Message Questions and Tips:

- “Is your solar system working as you expected?”
- “Any questions or surprises with your bill?”
- “A storm is moving in next week, so make sure you have enough stored energy in your battery.”
- “Keep an eye on your solar monitoring app—this is a great time to get familiar with your system’s daily and monthly production. Tracking it regularly helps you spot patterns and make the most of your energy savings.”
- “Would you mind doing a 90-day update review of your system?” (Review link)
- “What do your neighbors and family think about your system?”

### Referral Prompt:

- “If anyone you know is curious about solar, we’d love to help them, too. Here’s how you can refer someone (plus you get [reward] if they go solar).” (Review link)

### Sample Template:

**Subject:** 90 Days of Soaking Up the Sun—Nice Work!

Hello, John!

How’s everything going? Any surprises on your utility bill—or questions we can help with?

#### A Few Sunny Tips:

- A storm’s rolling in next week! If you’ve got a battery, now’s a great time to double-check your stored energy just in case.
- Solar doesn’t ask for much, but a quick look at your panels from the ground can go a long way. Keep an eye out for leaves, dust, or debris that might need a quick clean-up.

#### Got a few minutes?

We’d love a quick 90-day check-in from you. [Click here to share your update →]

#### Oh—and don’t forget:

You can refer friends and family to us! If they go solar, **you both get \$250**. [Send a referral →]

Thanks for staying connected—we’re glad you’re part of the solar family!

Jim Bridger  
Pacific Solar



THRYVE

## 6-Month Check-In

**Goal:** Nurture the relationship, reinforce savings, provide helpful tips, and ask for referrals.

### Sample Message Questions and Tips:

- “You’re halfway through your first solar year—how are the savings looking?”
- “Check your panels for dirt, debris, and shading. A light cleaning, professional wash or trimming tree branches can boost performance.”
- “Compare your solar production to your energy usage—seasonal changes may impact both. If you’re using more energy than expected, consider shifting heavy usage (laundry, EV charging) to daylight hours for better efficiency.”
- “If you have not had a chance to provide a review of me and my company, now is a great time.” (Review link)

### Referral Prompt:

- “This is a great time to tell friends or family about your switch to solar—your story can help them feel more confident exploring it, too.”
- “Our referral program is still active—if a friend signs up, you both get [reward]. It’s a win-win!”
- Provide a simple way to refer with a custom link or QR code.

### Sample Template:

**Subject:** Six Months of Soaking in That Sunshine!

Hello John!

You’re halfway through your first solar year—how are the savings looking?

#### Quick Tips to Keep Your System Shining Bright:

- Give your panels some love—check for dust, leaves, or shade. A light rinse, a professional cleaning, or trimming back overgrown branches can give your system a nice little boost.
- Peek at your monitoring app now and then to track your daily and monthly production. The more familiar you get with it, the better you can spot trends and maximize those savings!

**P.S. Our referral program is still going strong.** Send a friend our way and you’ll both pocket **\$250**. [Click here to refer your crew →]

Thanks for staying sunny with us.

William Clark  
Pioneer Solar



THRYVE

## 9-Month Check-In

**Goal:** Prep for the 1-year anniversary; encourage referrals with a new perspective.

### Sample Message Questions and Tips:

- “You’re almost at a year of clean energy and savings! That’s awesome!”
- “Make sure you’re still connected on your monitoring and tracking daily performance. Familiarity with your system’s patterns helps you quickly spot dirt build-up and any performance issues.”
- “If you’re not already, try running dishwashers, laundry machines, and EV chargers during peak solar production hours (usually 10am–4pm). This helps you maximize savings by using your solar energy in real time.”
- “If you’ve loved your experience, now’s a great time to spread the word by reviewing us today.” (Review link)

### Referral Prompt:

- “Have someone in mind that wants to save money like you? Referrals only take a minute, and we do all the work.” (Referral link)

### Sample Template:

**Subject:** Celebrating Nine Months of Savings!  
Hello John!

You’re coming up on **one full year** of clean energy and sunshine-powered savings—how cool is that? Just popping in to see if you have any questions or if there’s anything I can help with!

#### A Few Bright Ideas:

- Compare your solar production to your energy use—seasonal shifts can affect both. If your usage is a bit high, try running energy-hungry appliances (like laundry or EV charging) during the day to get the most out of your solar power.
- Swap in LED bulbs if you haven’t already—small change, big savings.

Got someone in your circle who loves saving money too? Referring is super quick—and we’ll take care of everything. Plus, you both get rewarded. [Send a referral →]

Thanks for being part of the solar family!

John Fremont  
Wild West Solar



THRYVE

## 1-Year Check-In

**Goal:** Celebrate the milestone, reinforce trust, ask for testimonials and referrals.

### Sample Message Questions and Tips:

- “Happy One-Year Solar Anniversary! We’re thrilled to have helped power your home.”
- “Let’s get together and review your full year of savings.”
- “Check your system performance in your monitoring app and compare production over the seasons.”
- “Check your monitoring app or portal to view total energy production and monthly trends. Compare this to your utility bills to see how much you saved over the year.”
- “Would you be willing to provide a 1-year update to your review of us?”
- “Your journey could inspire someone else—mind leaving a quick review or referring a friend?”

### Referral Prompt:

- “You’re now a solar pro with one year of experience. Friends or neighbors might be curious—your story could be the push they need.” (Referral link)
- “Referrals are how we grow—plus you earn [reward] for each person who goes solar from your recommendation.” (Referral link)

### Sample Template:

**Subject:** Congratulations on One Year of Sunshine!

Hello John!

Happy 1-Year Solar Anniversary! Can you believe it’s been a whole year of sunshine-powered living? We’re so proud to have helped light up your home—and your savings. Now’s the perfect time to celebrate *and* check in.

#### A Few Bright Tips:

- Take a peek at your monitoring app and check out how your system performed across the seasons—it’s a great way to stay in tune with your energy trends.
- If you haven’t scheduled a panel cleaning or quick inspection yet, now’s the time! A little upkeep keeps your system working at its best.

With one year under your (solar) belt, you’re officially a pro. Know someone who’s solar-curious? Your experience might be just the nudge they need. [Click here to refer friends and family →]

Thanks again for being part of the solar movement—and for shining with us. Here’s to many more sunny years ahead!

Robert McClure  
Northwest Solar



THRYVE