



Getting the Most out of the Solar Explorer

The **Solar Explorer** is designed to help you understand the homeowner’s motivation, requirements, and expectations for solar energy. **Listen actively, ask thoughtful questions, and provide tailored solutions based on their needs.** Only speak to their goals—don’t weigh them down with information overload.

Here are some tips to get you started:

Your Logo

The top right corner of the Solar Explorer has an image placeholder for your company logo. Just click on it and upload your logo. Then print your Solar Explorers for use in the home.



Site Analysis

When you arrive at the customer’s door, introduce yourself and set the agenda.

Ask to walk around the property before going inside. This gives you the opportunity to build rapport (ask about their garden, pets, or family) while also checking if the home is suitable for solar. Fill out page 1 of the *Solar Explorer*.

1. Greet the homeowner warmly and introduce yourself.
2. Establish rapport by asking about their day or any non-business-related topics.
3. Walk around the home and take notes. *“Can we walk around the property to check sunlight exposure and electrical panels?”*
4. Take photos to help you remember later.

Site Analysis Form	
Main service panel (MSP)	
Amps, age, model, capacity	
Inverter location	
Conduit location/considerations	
Azimuth	
Tilt	
Shading considerations	
Roof type	
Roof condition	
Notes	
Photos to take:	
1. Photos of roof plane(s) where the solar array(s) will be	
2. Photos of main service panel	
3. Photo of front of the home	



Solar Explorer

You're in the home at the kitchen table. Time to discover your customer's reasons for going solar. Fill out page 2 of the Solar Explorer.

Tip: A best practice is to set the agenda: "Your home looks good for solar. So, now we can talk about your needs and what's important to you; then I'll talk about my company and how we can help you go solar; we'll design a system together; and finally, look at some numbers. If it all makes sense, I'll walk you through the process to get started. How does that sound?"

Tip: Ask open-ended questions to understand the Homeowner's requirements, challenges, and goals.

Below in the right column are some sample questions you can ask when filling out page 2 of your Solar Explorer.

Motivations Goals Considerations		Example Dialogue
General	What are your goals for going solar? What made you decide to look at solar now? Do you have other energy improvements?	<i>I will ask a few questions to better understand your situation and then share what we can offer you. What are your main goals for going solar? Is it about savings, energy independence, or environmental impact? Are there any energy-saving measures you've already implemented (e.g., smart thermostats, insulation)?</i>
Storage	Aware that solar will not work during outage? Concerned about blackouts? PSPS? Having reliable power (WFH)? Protecting home/food?	<i>Are there specific critical appliances you'd want powered during an outage (e.g., medical devices, refrigerators, or home offices)? Do you have frequent blackouts or power outages? How do you currently handle them?</i>
Future Energy/EV Charging	Use more, less or same in future? Plans to get a new EV? When? Estimated miles/year? Is your home ready for the arrival of your EV?	<i>Are you seeing increases in your energy bills year over year? Are you planning to increase your energy usage in the future? For example, do you plan to add EV charging?</i>
Options	Are you aware of how 30% Fed Tax Credit can work for you? Money set aside or financing? Lease/PPA?	<i>Are you familiar with the 30% Federal Tax Credit for solar installation? Would you like us to walk you through maximizing the Federal Tax Credit and other savings?</i>
How Important Are the Following?		
Quality	What's important to you in choosing a company to do work on your home? When considering quality work, what are you looking for?	
Experience	Do you prefer a local company, part of the community?	



Warranty	How important is having a great warranty?	
Aesthetics	How important is aesthetics? What do you like and dislike about solar you've seen?	
Misc.	What else is important for you in going solar? What would stand in the way of going solar today?	
Finance	If going solar today, how are you planning to finance it?	<i>Is keeping your monthly payments low more important, or is long-term savings your priority? Do you have a preferred financing option—such as a loan, cash payment, or lease?</i>

Tip: What is a good time to transition into reviewing the electric bill with your customer? During the section on current and future energy usage/needs is a nice spot. *“Are you seeing an increase in your electric bill?... Do you understand how you are being charged for electricity? Let’s take a look at your bill...”*

Tip: Once you’ve walked them through their utility charges, you can easily ask for a referral. *“Do you feel like you have a better understanding of how you are being charged for your electricity? Do you think your friends or family could benefit from this information?”*

For more sales tips, visit our Dealer Drive > Sales Resources or reach out to the Learning + Development team at jennifer.dombek@thryvehome.com. We’re here to help you *thryve*.