



From an assigned visit to a logged outcome

One outcome, on the opportunity, after every visit.

SET UP ONCE

- Log in from the invite email (check spam).
- Account: **Residential Distributed Energy Program (RDEP)**.
- Install the **LeadConnector** app, same login.
- RDEP email: for customers, inside the CRM only.

YOUR VISITS

Calendars > your assessment calendar

The sales manager moves each booked visit to you. Not there? Message us in #team-alpha on Slack.

BEFORE YOU GO

- Open the appointment, then the contact.
- Read the setter's note and the answers on the left.
- The homeowner expects a 1-hour arrival window and about 20 minutes.

ON THE WAY

- Only when you're actually leaving: set the appointment to **Confirmed**.
- That's the "rep is on the way" signal.
- Running late: tell the sales manager.

AT THE HOME

1. Qualify first, with the checklist. A whole-home generator wired to the panel disqualifies; a portable one is fine.
2. Look at the wall and the breaker box.
3. Enter the application. Say "application," never "sell." Up to 10 days to change their mind.
4. Welcome call: a link on their phone or your tablet.
5. Site survey photos last, after they qualify.

LOG THE OUTCOME (WITHIN 4 HOURS)

Opportunities > Home Energy Assessments > the homeowner's card > **Appt Disposition**

Clear any old choice, pick exactly one, Save:

Sold No Sale Not Qualified Follow-Up Required No Show Cancelled Rescheduled

- On the **opportunity**: not the appointment, not a call outcome.
- Sold moves the card to Sold. Follow-Up Required creates a follow-up task.
- Changing a Sold card alerts the sales manager: add a note saying why.