



From a lead to a booked appointment

Keep this beside you while you dial.

BEFORE YOU START

- **Google Chrome**, one CRM tab, microphone allowed.
- Account: **Residential Distributed Energy Program (RDEP)**.
- Your leads: **Contacts** (only yours show).
- Check the dial pad shows **your own number**.

WHEN YOU CAN CALL

- **9 AM to 8 PM Central, Mon to Sat.** Never Sunday.
- Lead outside Central: 9 to 8 their local time.
- Per number: max **3 calls in 24 h, 6 in 14 days**.
- Try each number on the lead before moving on.

CALL FAILED?

- Usually a bad number, not your dialer.
- One failed call: that number is dead. Next number.
- Every number fails on two leads in a row: tell us.
- Stuck screen: refresh (F5). Don't log out.

ON THE LEAD, AFTER THE CALL

Fill the setter fields on the left:

Homeowner?

Co-op?

Grid / Solar?

If solar: leased?

Add a short note: only what the rep must know.

BOOK IT

Add appointment > Meeting > New Appointments > status **Unconfirmed** > date and time > Save

- The form starts on Confirmed: **change it to Unconfirmed every time**. Never book on your own calendar.
- Offer two times: "I have a 10:00 or an 11:15." Best window 10 AM to 5 PM Central; evenings are fine.
- Leave about 3 hours before they must leave (they leave at 4: book by 1).
- Tell them: a 1-hour arrival window, about 20 minutes at the home.

NO APPOINTMENT IF

- A **whole-home generator** is wired to the panel. A portable one is fine.
- They ask to be taken off the list: thank them, end politely, mark the call **DNC**.

AFTER YOU BOOK

- The manager assigns a sales rep.
- You're credited in **Booking Setter**.
- Callback promised: add a task on the lead.
- No-show rebooks may come to you as tasks.