



SUNVOY

# How To Triple Your Referral Business Over The Next 12 Months



actionable  
checklist provided



proven industry  
leading strategies

## CHEAT SHEET

Report after report after report shows that customer acquisition is the highest soft cost in the solar industry. The Department of Energy even launched a \$100m "SunShot" initiative to make solar more affordable for everyone.

But beside paying a fortune for low quality leads from one of the many "pay to play" solar lead generation websites or other forms of paid advertising, what options do you have to reliably grow your business year after year without investing tons of time and money?

By now we've heard that the simplest and most effective way to bring more customers into the door is word of mouth. Referrals are at least 5 times more likely to convert than any other channel and also higher quality customers with less ongoing maintenance and pre-sale questions.

But getting referrals is easier said than done. Just sending yet another newsletter move the needle. (Raise your hand if you've already tried that).

We grew Insun Solar, a 60+ employee and \$10m+ in annual sales, Top 100 residential solar installer, from zero to a successful referral operation just a few simple but we were able to increase years in a row without a referral

Referrals by Year (Closed Sales)  
Date range: All time Frequency: 12m  
Referral 90

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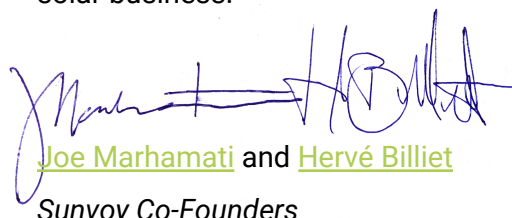
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We grew Ipsun Solar, a 60+ employee and \$10m+ in annual sales, Top 100 residential solar installer, from zero to a successful acquisition.

And by incorporating just **a few simple but effective strategies, we were able to increase our referrals 254% two years in a row** without changing the details of our actual referral program.

Within this short but value packed report we will show you the **exact steps we took** so you can drive similar or better results for your own solar business.

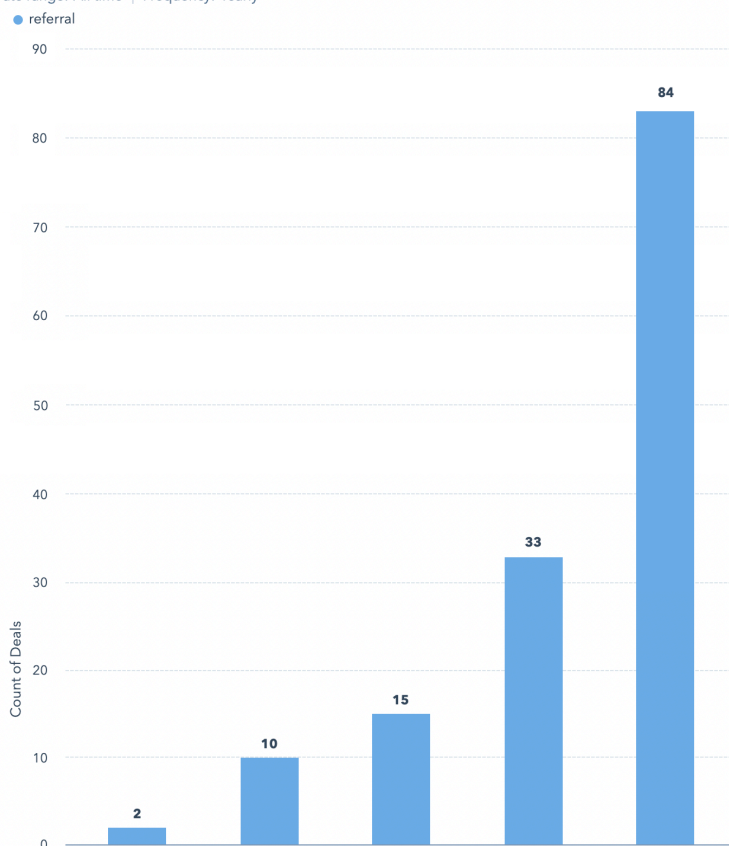


Joe Marhamati and Hervé Billiet  
Sunvoy Co-Founders



Referrals by Year (Closed Sales)

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*Can you spot when we started to make a change?*



# 1. Stop giving away the customer relationship

**What's one of the first things you do after you have installed a shiny new solar system for your customers?** I bet it's showing them how to install the monitoring app from the inverter.

At least that's what 95% of all installers do. **Customers want to know how their system is doing and check their energy production and consumption.**

So what's wrong with that? You are handing over the most valuable assets your company has and paid a small fortune to acquire: **The customer relationship.**

When the customer checks their energy production week after week on a 3rd party app and receives monthly energy reports from a different company, **they slowly start to forget who actually installed their system.**

And then, in the crucial moment when somebody asks them for a recommendation they might not even remember your company's name any longer.

*Now compare that with Ipsun Solar's approach since 2021:* Right after somebody signs a contract, **they give them access to their own app with their own branding.** The app allows their customers to check their energy production once the system is online, and even updates them about how their construction project is progressing before it is installed.

This way, their customers **are constantly reminded** about **who installed their system** and they earn access to their most valuable screen real estate:



A customer's smartphone.

## 2. Use consistent branding across all channels

**Everybody knows McDonalds.** And while the nutritional value or even quality of their food is controversial, there is no doubt that they are one of the most valuable franchises on earth.

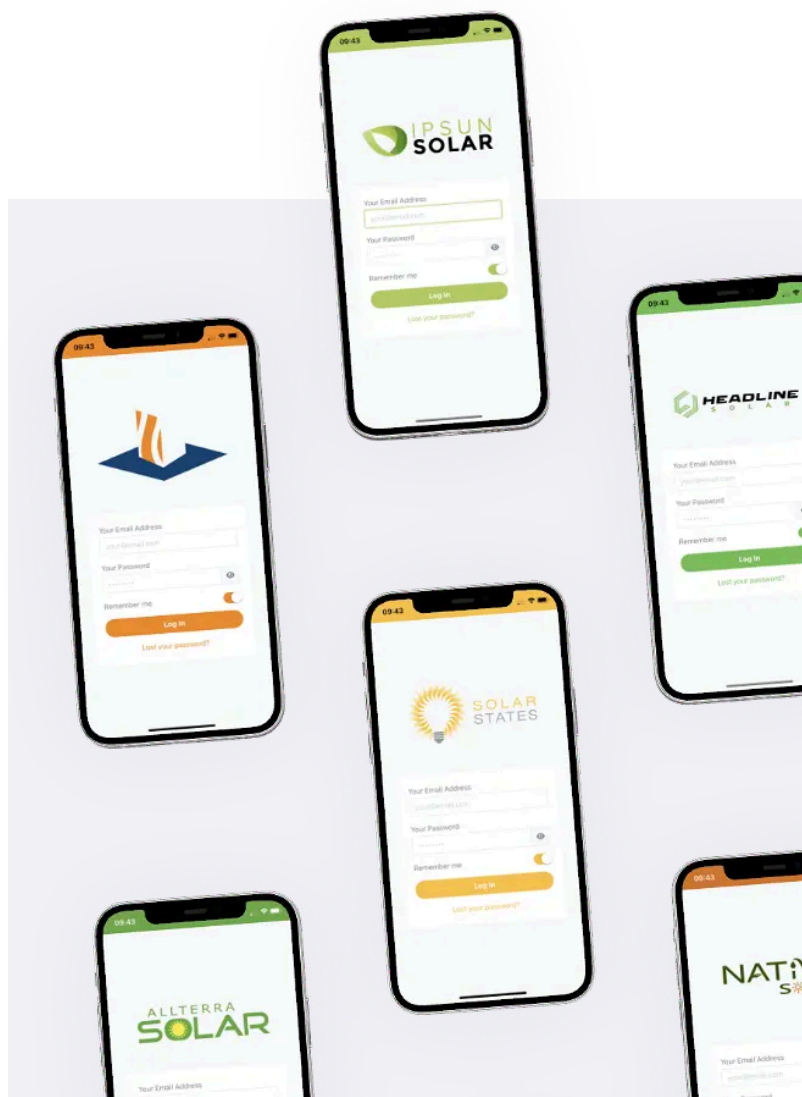
One thing they do particularly good is branding. From the restaurants, to the napkins and packaging **just about everything has their logo on it.**

If you are a solar installer at the very last you try to put your logo on employee uniforms, trucks and business cards. But we forget that our customers only see these things a handful of times, **while they check their smartphone religiously multiple times a day.**

Ipsun Solar started to embrace that fact, and invested heavily into **having their own brand front and center in all digital communications.** From monthly energy report emails to the monitoring app and platform their customers use daily.

**Only this way you can ensure that customers actually remember who installed their system** and differentiate yourself from less sophisticated competitors that struggle to maintain consistent branding and therefore appear less professional.

**Whatever software you use,** make sure it can be white labeled and **puts your logo vs. their own brand front and center.**



### 3. Provide excellent customer service

**Before you can build a house, you need to prepare the ground and lay the foundation.** The exact same principle applies to getting referrals.

Unhappy and unsatisfied customers won't recommend you to their friends and family.

And while this is obvious, we still stumble across hundreds of reviews like below that show **one of the main causes for unhappy solar customers is bad communication** after they have signed:

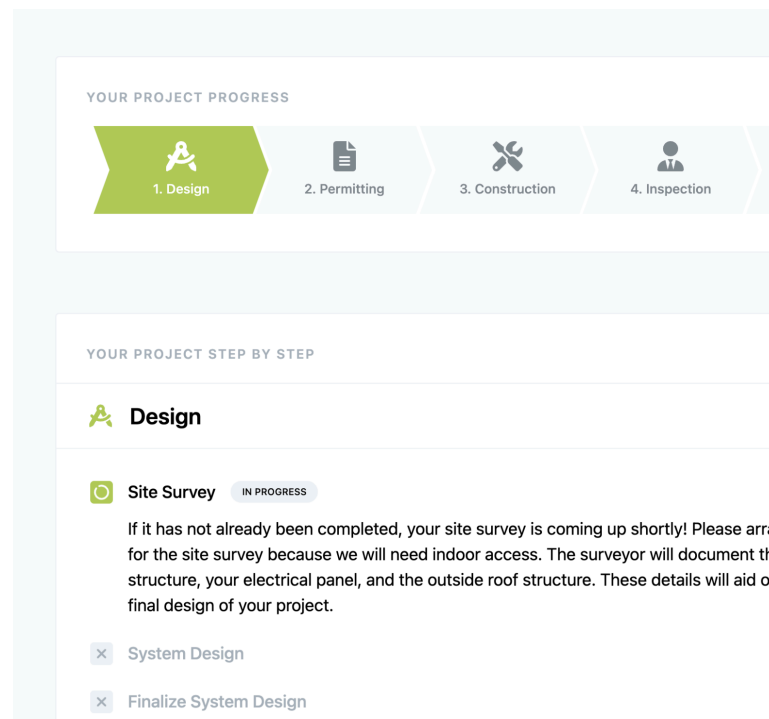
#### Disorganized, confused and no communication



Bottom line first: What was supposed to take 1 week to install took over 2 months before my system finally went online. Everyone was nice and friendly, but it was obvious early on that nobody knew what they were doing. Delays after delays and having stuff stored in my garage for weeks only to discover that no one ever did an inventory on what was brought onsite. When they did they had to order more missing parts. And maybe the worst: Workers showed up at random and no one seemed in charge. Information was never conveyed to me. I had to constantly track down the so called project manager (whom I never met in person) just to found out what was going on.

This is so common in the solar industry because it's always growing and we constantly struggle to find project managers that can effectively keep the customer in the loop.

**The solution is getting your project managers to actually do less by automating part of their job.** We automatically send project update emails as the project is moving through design, permitting and construction phases. **This establishes a baseline of communication** so that our project managers have time to grab the phone to reach out to customers when it's actually necessary without feeling overwhelmed.





## 4. Make it personal & approachable

**Everybody hates telecommunication companies.** The reason is because they are the exact opposite of being personal and approachable.

They are faceless mega corporations that are hard to reach and constantly excuse themselves for their poor customer service.

If you have worked for any number of years in the solar industry you should know that **people buy from people.**

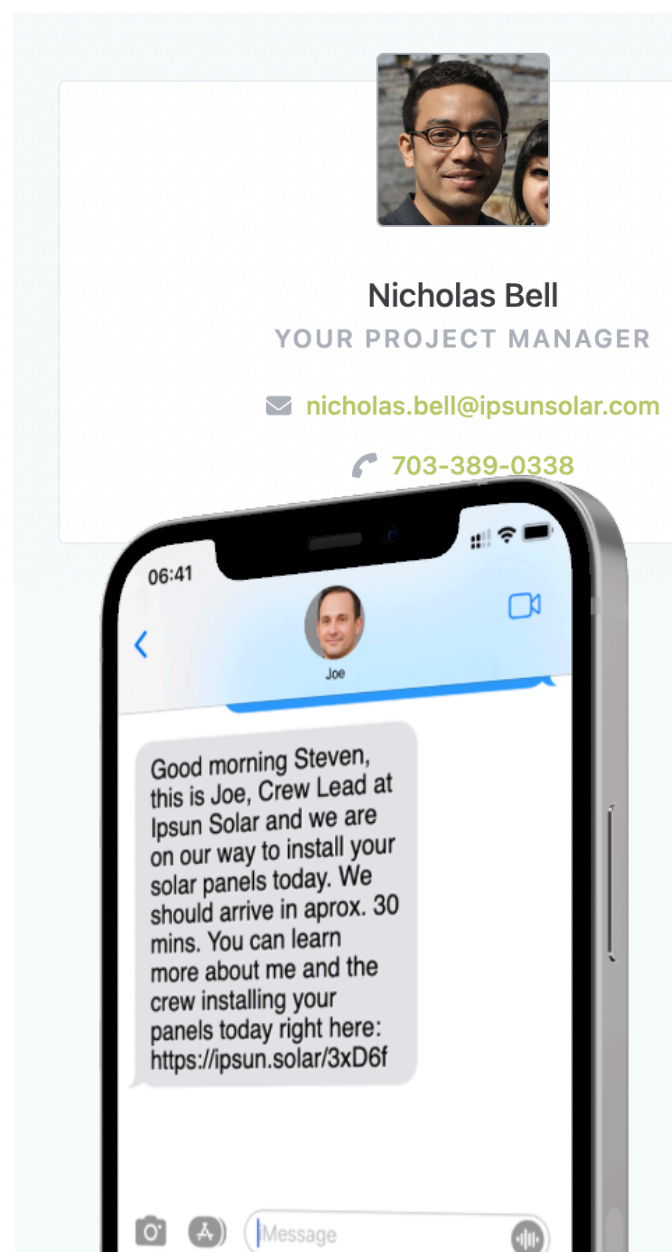
The same is true for building a great customer relationship. We have transitioned from trying to mimic mega corporations to being personal and approachable in every interaction.

Especially after COVID where it became hard to meet in person, we started **displaying photos of our actual sales managers and project managers** throughout the app along with their full names, emails and direct phone extensions.

**We even send personalized text messages** with one click from our app before a site visit. Including the technician's name and a link to their bio and profile to learn more about who's actually visiting your house today.

This makes our customers **more invested in the people behind the process** and gives them a personal contact to reach out to when they need help or have a question.

Helping tremendously with **5 star reviews that mention crew members and increased referrals when our team members ask for it.**



## 5. Stay top of mind with easy to share milestones

**You know why Facebook, Instagram and Snapchat are so successful?** Because they play with your dopamine levels, giving your brain tiny rewards every time you pick up your smartphone and open up their carefully designed app.

This is hard to replicate for something as “boring” as a solar company.

*Or at least we thought so initially.*

**Take a look at the facebook story to the right.** This customer couldn’t be more thrilled about going Solar with us.

And the best is **she shared that excitement and our contact information with everybody she knows.** Do you notice the number of reactions and shares this post got? **Even better: It brought in 14 high quality leads in just a matter of days.**

Now think what it would mean to your business if the same happens multiple times per year, on auto-pilot all of your customers.

Through our app we send push notifications everytime our customers hit an important milestone, like the first day they produce more energy than they consume, the annual “birthday” their system went online or the point where they have reached the ROI point and start earning money every month.

Unlike sending yet another newsletter we send **personal, timely and relevant information** they actually care about.

No wonder Customers get excited and naturally tend to share it with their friends. **Instead of spending even more on ineffective online advertising, you can turn your customers into your marketing department.**



## 6. Ask for referrals multiple times in multiple places

**Do you have kids?** Then you should know that sometimes you need to repeat the same thing multiple times and they might still not get it.

**Repetition is key.** The most effective way in getting referrals beside just asking for it **is asking for it multiple times across different channels without being annoying.**

Maybe the first time you ask for a referral the customer was busy with something else. They meant to get to it but eventually life got in the way and then they forgot.

At Sunvoy, we make it a priority for you to ask multiple times for referrals, remind customers that this is the most effective way to support our mission of fighting climate change and keep repeating that message for the lifetime of a customer.

You never know who in the network of a particular customer might be thinking about going solar at a particular time.

**In practice this means we:**

- Ask in person after the system has been installed
- Send a personalized text message when the system went online
- Call after a few weeks that the system has been online
- Have a dedicated referral area within our app (*more on that below*)
- Send monthly energy reports that mentions our referral program at the top of the email
- Get customers back into our app and the referral area with personalized milestones that entice them to share
- Keep the customer up to date on any referrals that they have submitted (*I will tell you why that matters in just a minute*)





## 7. Create a personalized & conversion optimized landing page

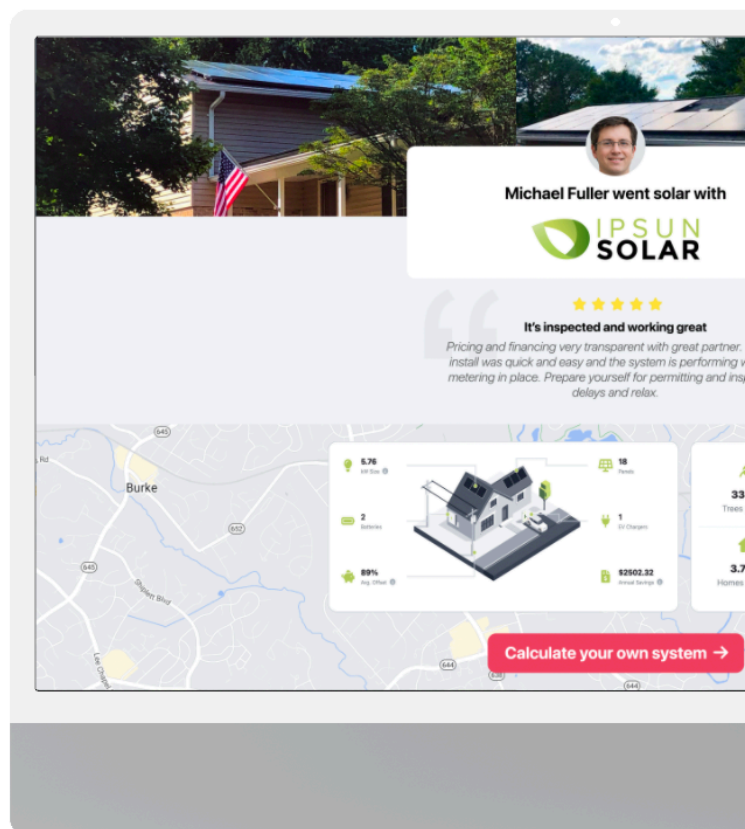
### What do you think is more effective in generating referrals?

A generic page on your company's website with a simple lead generation form or a personalized landing page that contains:

- the name and photo of the person who referred you with a review why they were happy
- a handful of carefully picked high quality photos of their actual system you might have seen in person
- real time information on the amount of energy produced and money being saved
- system specific details like the inverter brand & panel manufacturer if you want the exact same system
- a map of other nearby systems the company has installed in your area
- aggregated review stats, customer testimonials and industry authority badges to reassure the potential customer
- an easy to use calculator to estimate your own system size and savings and asks you at the end for your contact details so you get provided a free but accurate quote
- All under your own branding

**It's easy to see why one approach win's over the other.**

The problem is that this is next to impossible to implement for the average solar company. Yet **our app generates these personalized referral links automatically** for each of our customers.



## 8. Create a referral hub & close the loop

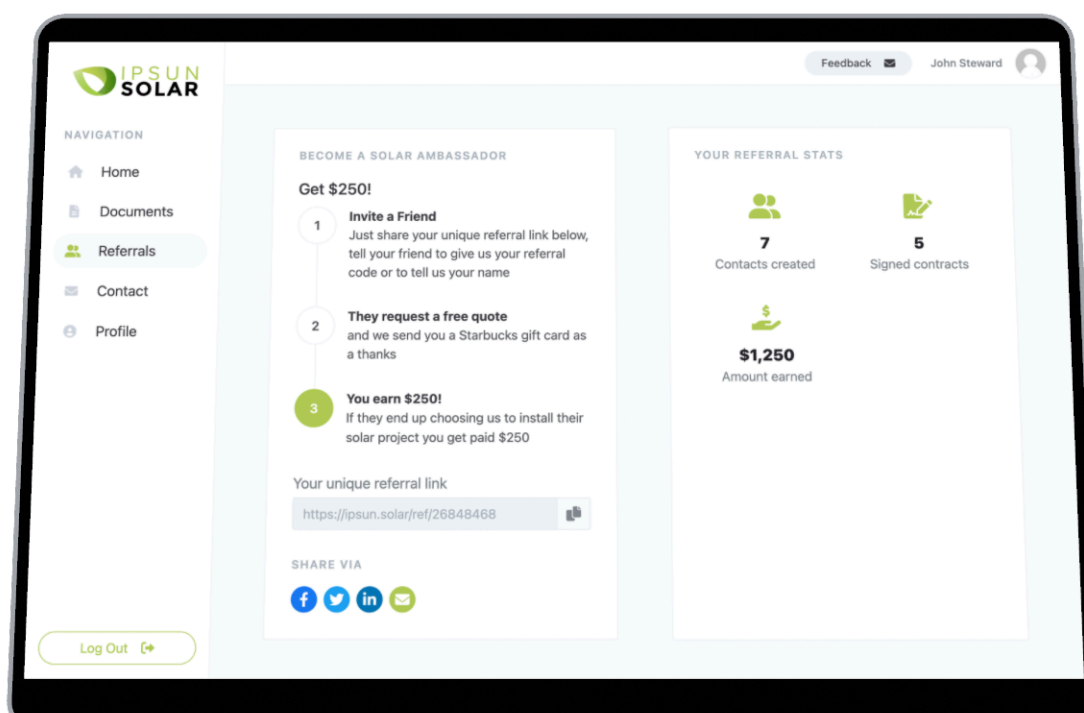
**When you donate blood in Sweden you get sent a follow up text when your blood's been used.** The happy ending makes us want to do it again. And because of a little psychological bias, how an experience starts and ends becomes especially important.

You need to do the same with your referrals.

If a customer refers somebody to your company it's terrible if they need to question if you actually followed through or at the very least got back to them quickly.

On the other hand if you send a little thank you like a free coffee immediately after the referral has been created, and then keep the customer updated on when a quote has been given or contract has been signed together with their referral reward **they become more invested into the process and more likely to continue sending you referrals in the future.**

Even better if you can combine that with **a referral hub where they can easily find their unique referral link and see the aggregated statistics** of how many people they have referred to you.



## 9. Reward multipliers handsomely

From our conversation with dozens of top tier solar installers we noted that not all referrals are created equal.

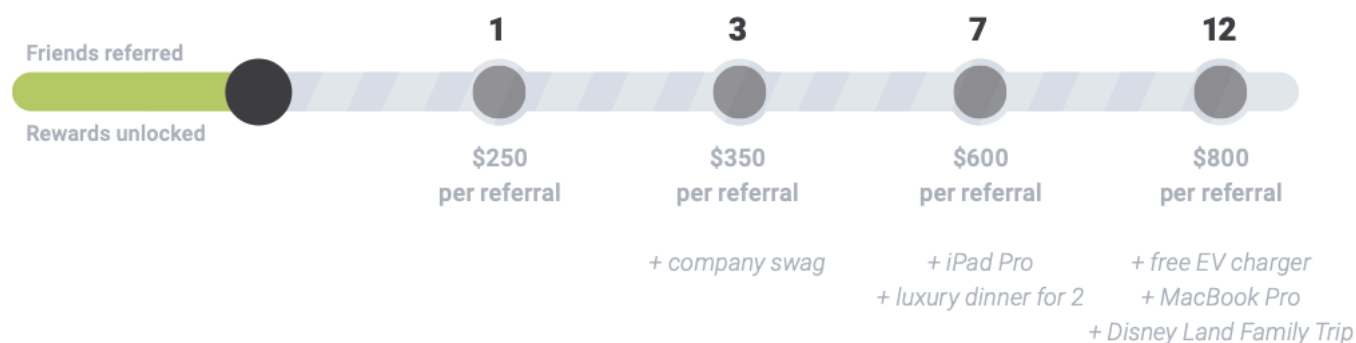
Even in your own business you might have noted that some customers can refer dozens of people where others can't refer even a single new customer.

So how can you capitalize on that and **encourage and motivate those multipliers even more?**

By creating multiple referral levels with different rewards. This way your most connected customers will feel **highly motivated to reach the next level** and while continuing to bring new opportunities to your business.

The first few levels should feel plausible to achieve quickly so the customer get's some momentum, where the higher levels should feel ambitious and something to look forward to.

### Your Progress:



## 10. Now what?

After reading through all this material you might be overwhelmed and wondering: **How can I implement this and achieve similar or better results for my own company?**

Truth to be told:

The first urge of just grabbing this white paper and handing it to your marketing and sales department will not achieve anything. *(We know from our own painful experience that knowledge alone doesn't cut it).*

Nor should you just toss this aside and get back to the day to day craziness of putting out fires while running your business.

**The good news is that we have already done the work for you.**

We eat, sleep and breathe this stuff every day.

And we actually decided to offer **free audits** to any solar installer that wants to see for themselves **how they can completely transform their business over the next 12 months without any extra spend on marketing or hiring new employees.**

[Click here to book a free call](#) with our principal Co-Founder and COO **Joe Marhamati**. He will help you personally uncover your biggest opportunities and blind spots. And if it's a fit, he will show you what it would look like to have our team working alongside yours and **use our tailor made software** to implement some of these strategies and more you'll discuss on the call.

We aim to make it the best 40 minutes you spend at work this week.

**Book your free audit right now →**



## Checklist

- ☒ ~~Read this free white paper~~
- ☐ [Book your free audit](#)
- ☐ Use your own app for monitoring
- ☐ Create a customer portal that displays the customers progress
- ☐ Send automated progress updates to customers
- ☐ Make sure every customer facing software is white labeled
- ☐ Send monthly energy reports under your own branding
- ☐ Communicate the full name, photo, phone number and email of your employees
- ☐ Send personal text messages before site visits
- ☐ Stay top of mind with personal and relevant milestones
- ☐ Make it easy to share
- ☐ Ask for referrals multiple times in multiple places
- ☐ Create a personalized & conversion optimized landing page
- ☐ Create a referral hub
- ☐ Create multiple referral levels
- ☐ Follow up with customers on how their referrals are progressing

