How To Use **Sunvoy** To Crush Your Company Goals

SUNVOY

Sunvoy offers powerful functionality and numerous benefits for every member of your solar company, from crew, to project managers, sales or even you as an executive.

Within this guide, we'll highlight the most important features to help your team leverage Sunvoy and drive company-wide success. We'll help you:

● **Recognize the business value of Sunvoy**

Sunvoy is a complete system. With its integrated features, **everyone from sales to operations can collaborate more easily, make quicker decisions, and work with better visibility into projects and customer relationships.**

No more bouncing between different tools or manually tracking information across hundreds of different tabs.

● **Track key metrics with the dashboard**

Sunvoy's dashboard gives your team a **simple, real-time view of important company stats**, from how many leads you're getting to how well your solar systems are performing.

One standout feature is its clear snapshot of solar operations.

While many CEOs focus on sales, they often lack clear data on installations. Sunvoy fills this gap by showing exactly how many systems are being installed each month.
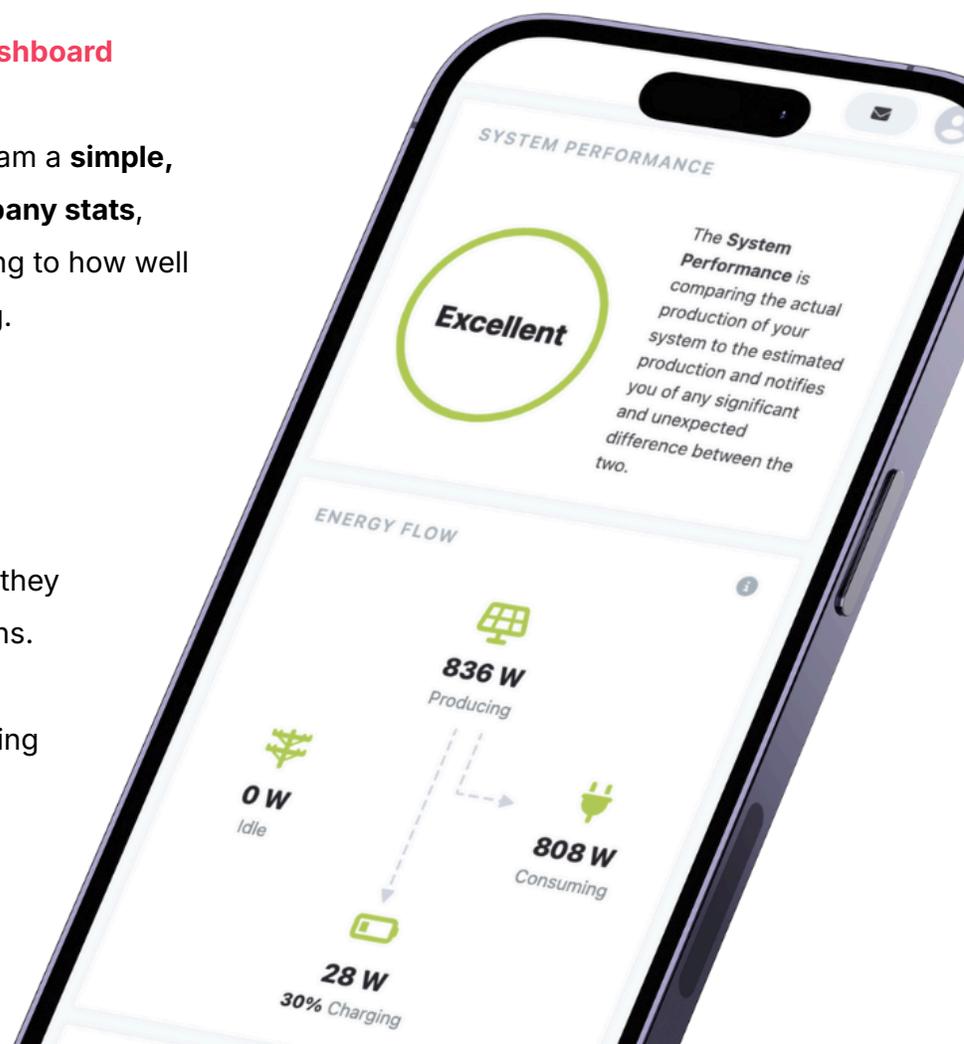
The dashboard also breaks down each project by phase, making it easier for leadership to allocate resources where they're needed most.

Whether you have just a few inverters to monitor or over 100 that need urgent attention, Sunvoy gives you the insight to make smarter, faster decisions.

- **Increase revenue through referrals and reviews**

Sunvoy makes it easy to track customer referrals and gather 5-star reviews, which are **essential to expanding your customer base on auto pilot.**

With Sunvoy's referral payout system, you will enjoy a complete, turnkey solution for managing referrals—from reminding customers to provide referrals, to gathering them, pushing them into the solar installer's CRM, and even automating referral payouts.

You can easily set up automations that consistently prompt every happy customer to leave a review and refer others to your business, no matter which sales or project manager they worked with.

- **Unlock new revenue streams with Sunvoy**

Another key feature is its ability to track actual solar performance against estimated performance—a challenge many companies face due to limited time and resources.

With Sunvoy, this becomes effortless.
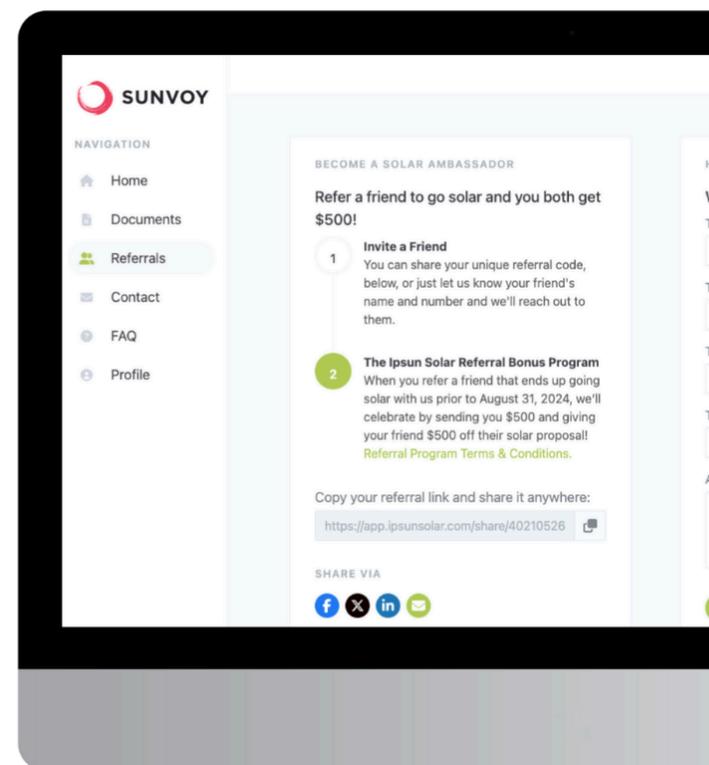
Additionally, by offering lifetime active monitoring or performance guarantees to clients, solar companies can generate new revenue streams.

These services provide ongoing value to customers, manage expectations around O&M, and keep clients connected to your company long after installation.

- **Customize your company's app for the app stores**

Sunvoy provides a beautiful and seamless white-labeled app that lets you create **your own branded app for both the Apple and Google Play** stores within just days.

This means you can provide your customers with a personalized experience.

This is while further solidifying your brand in their minds without ever having to deal with complicated native development or IT procedures yourself.

Trusted by Industry Leaders

Click here to find out what some of the largest solar installers in the country and worldwide love about Sunvoy.

Now that we have an idea of what Sunvoy can offer, let's dive deeper into **how you can use Sunvoy to crush your company goals:**

1. Leverage the business value of Sunvoy

The first thing to understand is that Sunvoy was carefully designed to create a **powerful flywheel effect within your solar business,** boosting both the customer and employee experience.

This improved experience leads to more 5-star reviews and customer referrals, which in turn drive new business.

As this process repeats, your solar company can grow steadily and efficiently, all while keeping customers happy. It's a win-win.

The best part? **Once Sunvoy is up and running, it requires minimal ongoing effort from the team.**

The system works behind the scenes, automating many of the routine tasks that usually eat up time and attention. This lets everyone stay focused on their core responsibilities without getting bogged down by administrative work.

CUSTOMERS

GROWTH

REVIEWS

REFERRALS
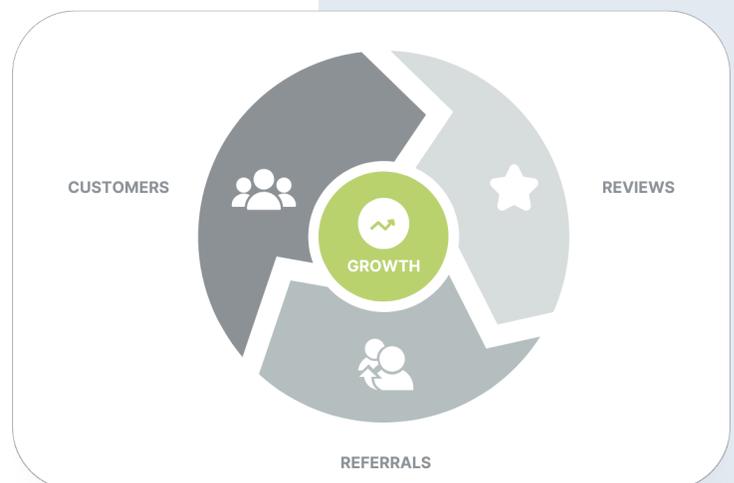
Some results other companies generated by implementing Sunvoy:

2. Elevate your branding & customer experience

If you were asked to guess which stock has outperformed the S&P 500 by 10 times, you might be surprised to learn *it's Domino's Pizza.*

A key driver of this success? **Digital innovation,** like their virtual pizza tracker, which lets customers follow their order from the moment it's placed until it arrives.

Now, consider the solar industry.

Despite dealing with projects far more complex and expensive than a pizza, it often lags behind in offering a seamless digital customer experience.

That's where Sunvoy comes in.

Sunvoy provides a **beautifully designed white-label app that features your company's logo, branding, and everything needed to stand out in the solar industry**.

More importantly, it brings solar companies into the digital age, offering customers the kind of transparency they've come to expect in everyday transactions.

With Sunvoy, your customers can track the progress of their solar installation, just like they would with an online order.

This added transparency:

- builds trust,
- keeps customers engaged,
- and ultimately leads to better satisfaction.
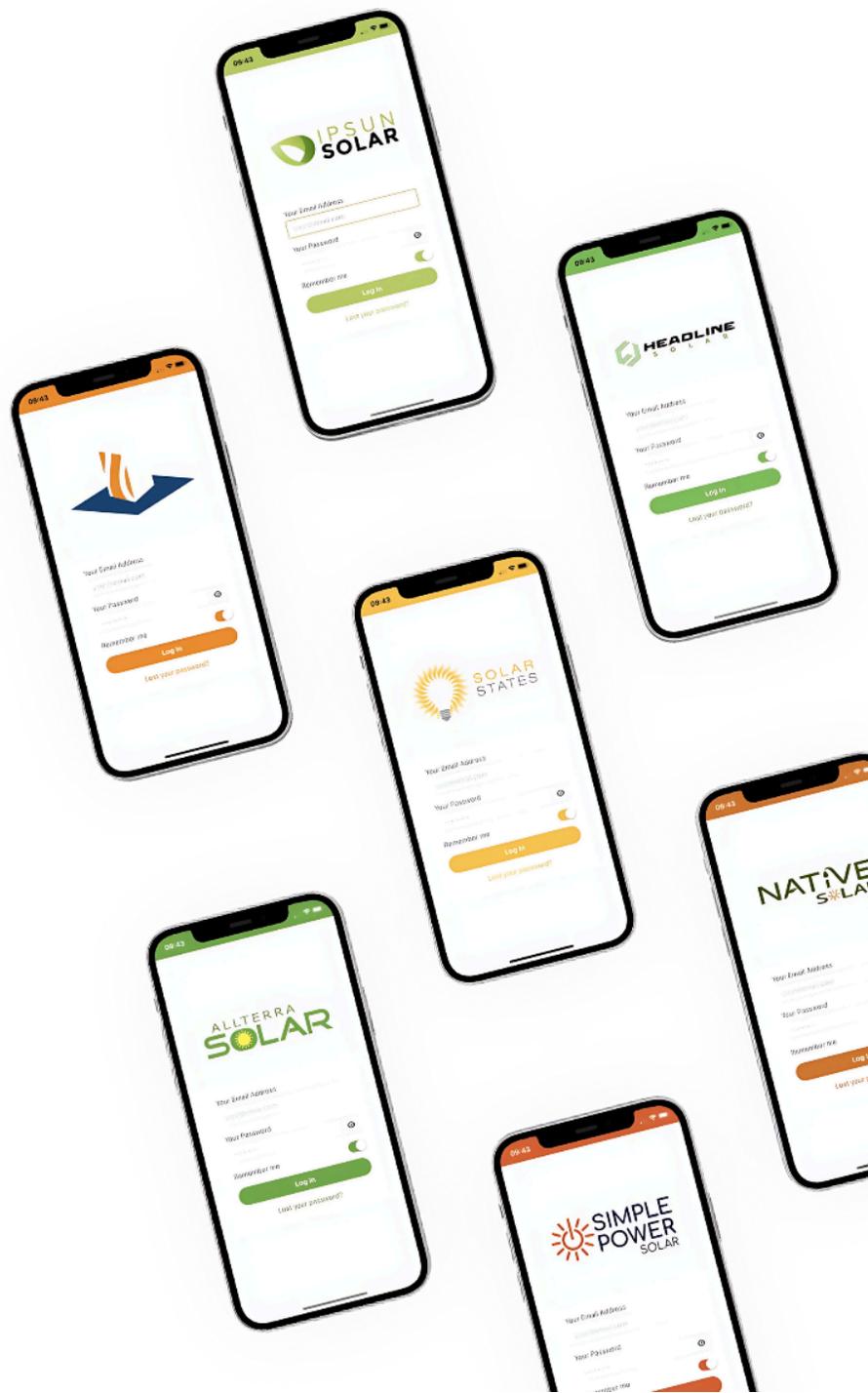
3. Gain more 5-star reviews & customer advocates

A significant number of negative reviews can often be traced back to one core issue: *poor or nonexistent communication when something goes wrong.*

But when the solar installation process is **streamlined and customers are kept in the loop at every stage,** the outcome is usually much better.

Which of course, leads to happier clients who are more likely to leave positive reviews.

Sunvoy makes this easy by integrating transparent communication and automating requests for feedback at key moments in the customer journey—*right after system installation, after a positive interaction, or following an in-person meeting with a crew member.*

This increases your chances of receiving glowing reviews by reaching out at just the right time even if the responsible project manager happens to be out of office.

This proactive approach ensures customers feel heard and valued throughout their experience.
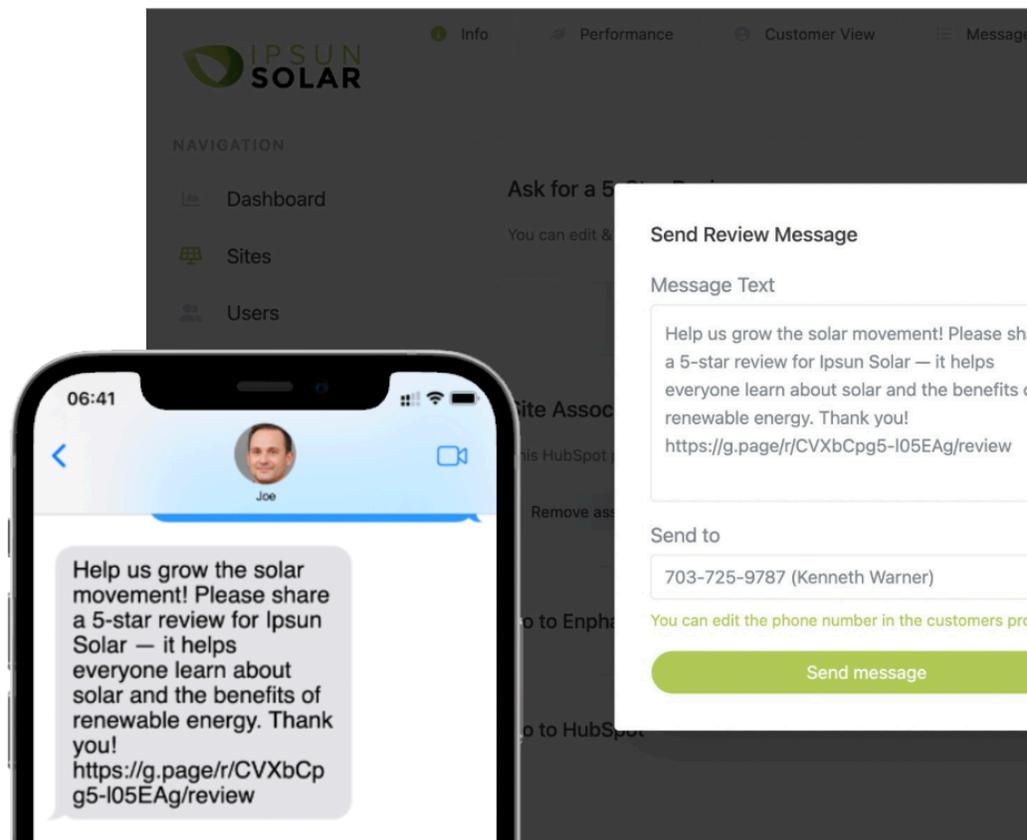
4. Gain more referrals

Happy customers don't just stick around, they spread the word.

Word-of-mouth is one of the most powerful marketing tools, and it all starts with optimizing the customer experience to naturally encourage referrals, even long after the initial installation.

Staying connected with your customers is key, whether it's a few months or even years after the installation.

It's not just about the initial sale—i*t's about providing ongoing value over the 25-year lifespan of their solar system so they keep your company name top of mind whenever they think about solar.*

Sunvoy helps by keeping customers engaged with your company's app, where they'll see your logo and branding every time they check in on their system.

Keep in mind that when customers are reminded of who's responsible for their energy savings and sustainable power, they're more likely to recommend your services to others instead of the inverter brand whenever they are asked!

5. Resell at markup

Sunvoy already "soft" pays for itself by generating more referral business for your company and reducing cost of acquisition.
But it can even "hard" pay for itself literally, if you decide to sell access to your own app at cost or at a markup like other Sunvoy customers have done successfully in the past.

On avg. We have seen **a >90% attachment rate** (the percentage of solar customers which purchased access to the installers app at a markup) **after adding a line item to every sales proposal** that says *"Lifetime Access"* for prices running between $129 and $300 or even *"Lifetime Active Monitoring"* for up to $1,495.

Any kind of markup over the retail price of Sunvoy ($95) only adds an almost neglectable increase to the cost of an avg. sized 10kW system for the homeowner:

IPSUN SOLAR
521 N Main St, Mt Holly, NC 28120, USA
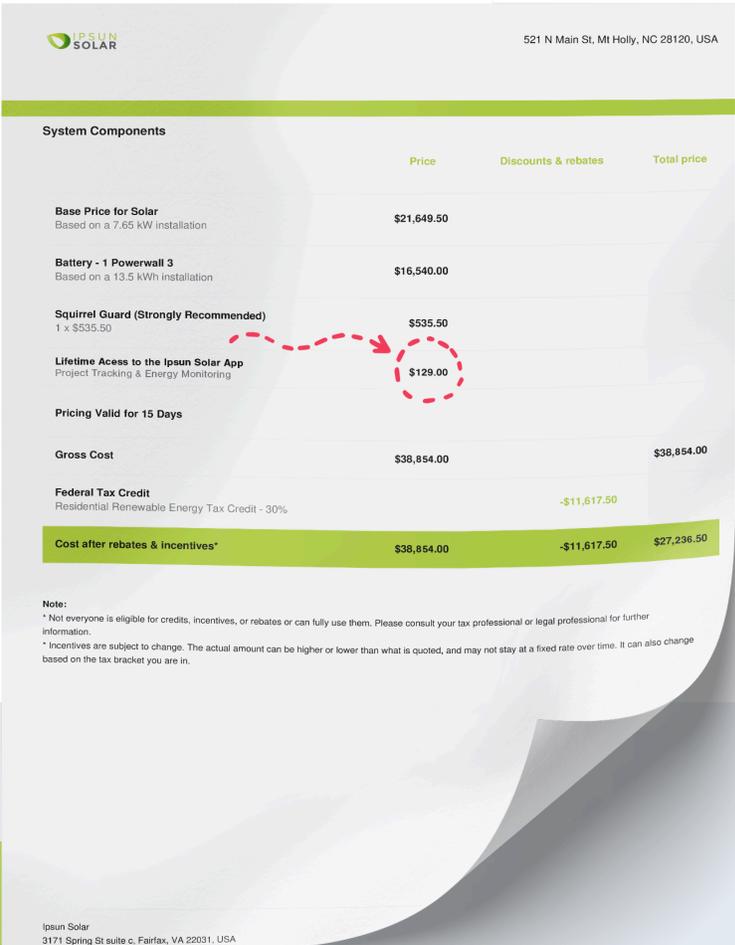
System Components	Price	Discounts & rebates	Total price
Base Price for Solar Based on a 7.65 kW installation	$21,649.50		
Battery - 1 Powerwall 3 Based on a 13.5 kWh installation	$16,540.00		
Squirrel Guard (Strongly Recommended) 1 x $535.50	$535.50		
Lifetime Acess to the Ipsun Solar App Project Tracking & Energy Monitoring	$129.00		
Pricing Valid for 15 Days			
Gross Cost	$38,854.00		$38,854.00
Federal Tax Credit Residential Renewable Energy Tax Credit - 30%		-$11,617.50	
Cost after rebates & incentives*	$38,854.00	-$11,617.50	$27,236.50

Note:
* Not everyone is eligible for credits, incentives, or rebates or can fully use them. Please consult your tax professional or legal professional for further information.
* Incentives are subject to change. The actual amount can be higher or lower than what is quoted, and may not stay at a fixed rate over time. It can also change based on the tax bracket you are in.

Ipsun Solar
3171 Spring St suite c, Fairfax, VA 22031, USA

Results:

97%
attachment rate

$129
retail price

$45,021
additional revenue*

12 months
period

* At 30 solar systems sold per month over a 12 months period

6. Offer lifetime active monitoring

Instead of simply reselling Sunvoy at a markup, you can also opt to implement your own "Lifetime Active Monitoring" plan using Sunvoy's features.

For example, Ipsun Solar successfully launched their "Ipsun Platinum Protection Plan," charging **$0.10 per watt or $1,000 for an average 10 kW solar system.**

With an impressive 80% attachment rate, they generated over $250,000 in additional revenue during the first year, which was used to staff their maintenance department.

This plan not only helped them efficiently handle service calls and expectations outside the workmanship warranty, but it also led to happier customers who felt supported long after installation, resulting in more word-of-mouth referrals.

Sunvoy makes implementing this kind of plan simple by providing all the necessary tools, from monitoring capabilities to marketing assets and sample contracts.

And best of all, there's no need for additional third-party services like Omnidian or Solar Insure.

7. Utilize your dashboard

Sunvoy's **comprehensive dashboard** gives you all the key insights you need to monitor performance, no matter your role in the solar business. Let's break it down:

1. **Important KPIs**

   Sunvoy's dashboard provides a quick snapshot of your company's performance.

   You can easily see the total number of systems installed, projects signed, and track growth over time—whether that's month-over-month or year-over-year.

   The dashboard also helps you stay ahead of potential delays by identifying bottlenecks in your construction projects.

   And with aggregated inverter error codes and **comparisons of estimated vs. actual system performance,** you get valuable insights into the health of your solar fleet.

   This information allows your team to proactively manage any issues before they become bigger problems.

2. **Sessions, Users and New Users**

Unlike other software platforms that keep user data hidden, **Sunvoy offers full transparency into the adoption of your app.**

You can easily track how successfully your company is using your own app. The dashboard shows how many users are logging into your app over specific time periods, so you can monitor engagement trends.

You'll also be able to **compare user activity over different time frames and segments,** helping you understand how your team and customers are interacting with Sunvoy.

This gives you a clear picture of platform adoption and overall engagement.

Sessions	Users	New Users
367	**249**	**163**
↑ 1259%	↑ 1560%	↑ 1938%

Last 7 days | Last 30 days | Last 365 days

Stats per User Role

Customers | Employees

Pageviews: ↑ 1968%

Sessions: ↑ 3243%

Active Users: ↑ 2783%

Avg. Session Duration: ↓ -53%

Last 7 days | Last 30 days

3. More relevant events

Sunvoy highlights the most important events happening within your app.

This essentially makes it extremely simple to stay on top of key activities.

The "Events" widget offers a summary of important metrics—like the number of page views, emails sent, and referrals generated—over different time frames.

With this feature, every team member can quickly understand the impact of their efforts within the platform and see where improvements can be made.
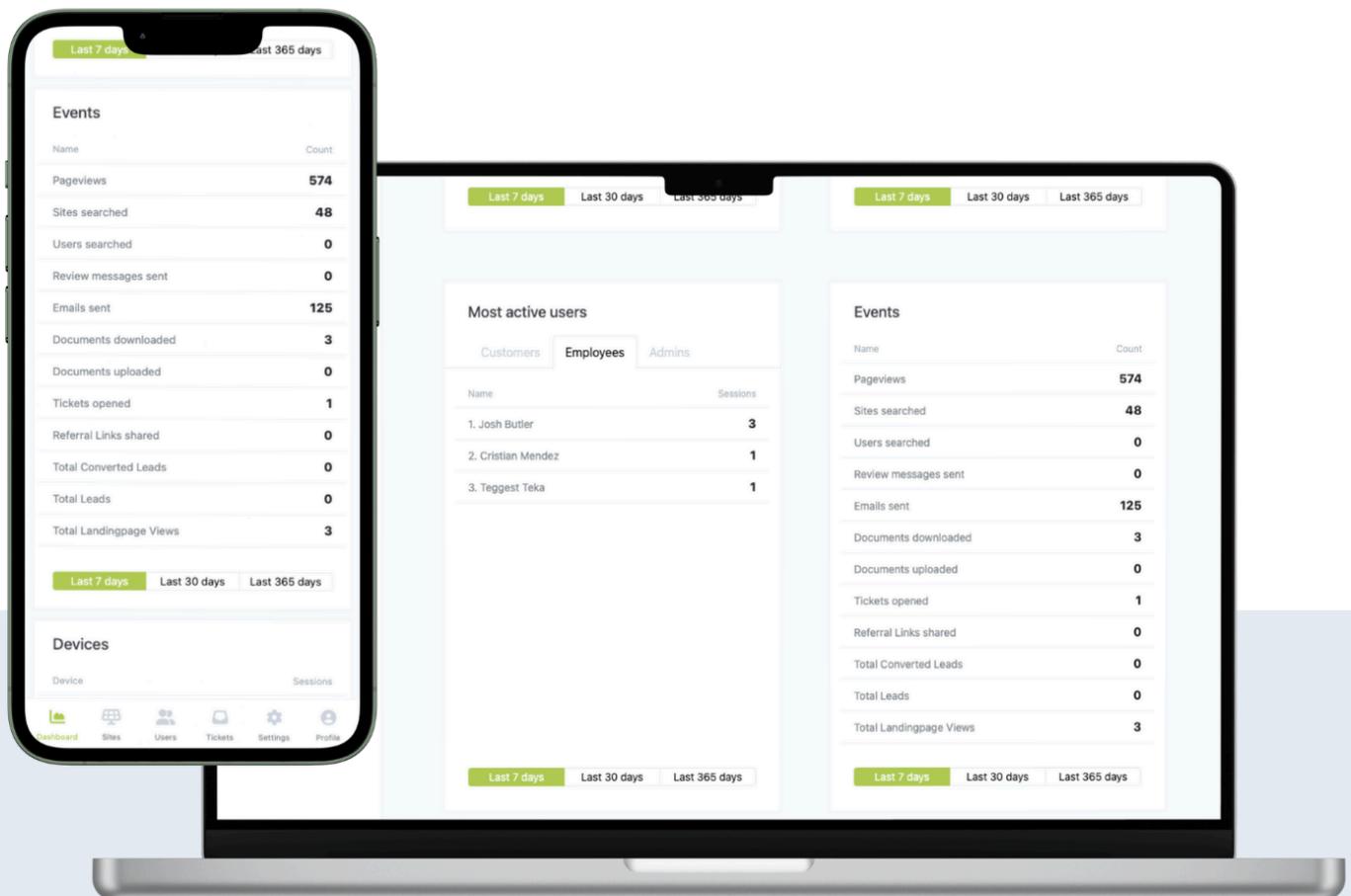
8. Set 3, 6 and 12 months goals

It's important to have a clear understanding of the goals you want to achieve with Sunvoy and what your plan looks like for the next three, six, and twelve months.

This ensures that the entire team—whether you're in sales, project management, operations, or marketing—gets the most out of Sunvoy and its full potential.

Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Tech Onboarding 1	**Tech Onboarding 2**	**Project Managers Training**	**Sales & Marketing Training**	**O&M and Crews Training**	**Legacy Customers Onboarding**
Custom Domain Email Address Phone Number Connect Inverters Connect CRM

Homework:
Project Phases & Steps | Map CRM Fields Marketing Settings

Homework:
Map Phases & Steps | Understand Sites, Systems and Projects Update Information from your CRM Troubleshooting Document Management PTO Calls | Social proof Nearby Systems Resell Sunvoy Generate Reviews & Referrals | Use cases to practice Associations Estimated Performance Data Monthly Reports Automations Tickets | Invite all legacy customers for free |

Within 3 Months

- ☐ Sunvoy has been "soft" launched within your company.
- ☐ All new customers are automatically onboarded to the app and can track their project to completion.
- ☐ Login reminders have been set to encourage app usage.
- ☐ Your brand is launched in both the Apple and Google Play Stores.
- ☐ The team, including project managers, sales, marketing, and operations, has been invited to the app and trained on how to use Sunvoy for optimal performance.
- ☐ Customers automatically receive project updates via text and email as their installation progresses.

- ☐ A monthly summary report is sent to new customers once their system is successfully installed.
- ☐ A link to the customer portal is now available on your website.

Within 6 Months

- ☐ Sunvoy has been "hard" launched to all legacy customers.
- ☐ Access to Sunvoy is being resold at cost or with a modest markup as part of all proposals.
- ☐ Reviews and referrals are being generated automatically in the background through personalized referral pages.
- ☐ Two broadcasts have been sent: one to generate referrals and another to onboard legacy customers.
- ☐ Monthly reports are now being sent out to both new and existing customers.

Within 12 Months

- ☐ Estimated production data from your design software or CRM is being synced into Sunvoy.
- ☐ You are offering lifetime active monitoring through your own "Protect" program, utilizing the resources available in Sunvoy.
- ☐ An operations and maintenance (O&M) team is set up and uses Sunvoy to proactively monitor and troubleshoot systems.
- ☐ Sunvoy's monitoring and review landing pages are integrated into your marketing efforts.
- ☐ The sales team is using Sunvoy to showcase company size, nearby systems, and provide social proof to prospective customers.
- ☐ Project managers guide customers through the app during their "Permission to Operate" calls, uploading all relevant documents.
- ☐ You are in regular contact with your account manager, ensuring Sunvoy continues to support your business needs.

Additional Benefits

In addition to clear advantages, Sunvoy also delivers several "soft" benefits that are less obvious but equally valuable:

- **Simplified Access to Information**
  Sunvoy consolidates all relevant data into a single system, making it easier for your team to find what they need without switching between multiple platforms.

- **Improved Data Clarity**
  CRM and inverter data are displayed side by side, giving you a clearer, more organized view of all the important information you need to make informed decisions.

- **Streamlined Installation Process**
  Many teams discover clearer workflows and operational improvements as they integrate Sunvoy, helping refine how business processes are carried out.

- **Consistent and On-Brand Communication**
  Sunvoy ensures that all customer communications remain professional and on-brand through standardized message templates, even if someone is unavailable to send updates manually.

- **Increased Efficiency Through Automation**
  Automated customer communications and centralized access to information allow everyone to work more efficiently, focusing on what matters most without unnecessary distractions.

- **Easy Integration with Different Systems**
  Sunvoy supports over 50 solar-specific integrations, making it easy for the team to switch between different software and hardware vendors in the future without any disruption to operations.

- **Enhanced Customer Experience**
  Customers have a single point of contact for all their solar needs through your app.

  This leads to a smoother, more satisfying experience that reflects well on the entire team.
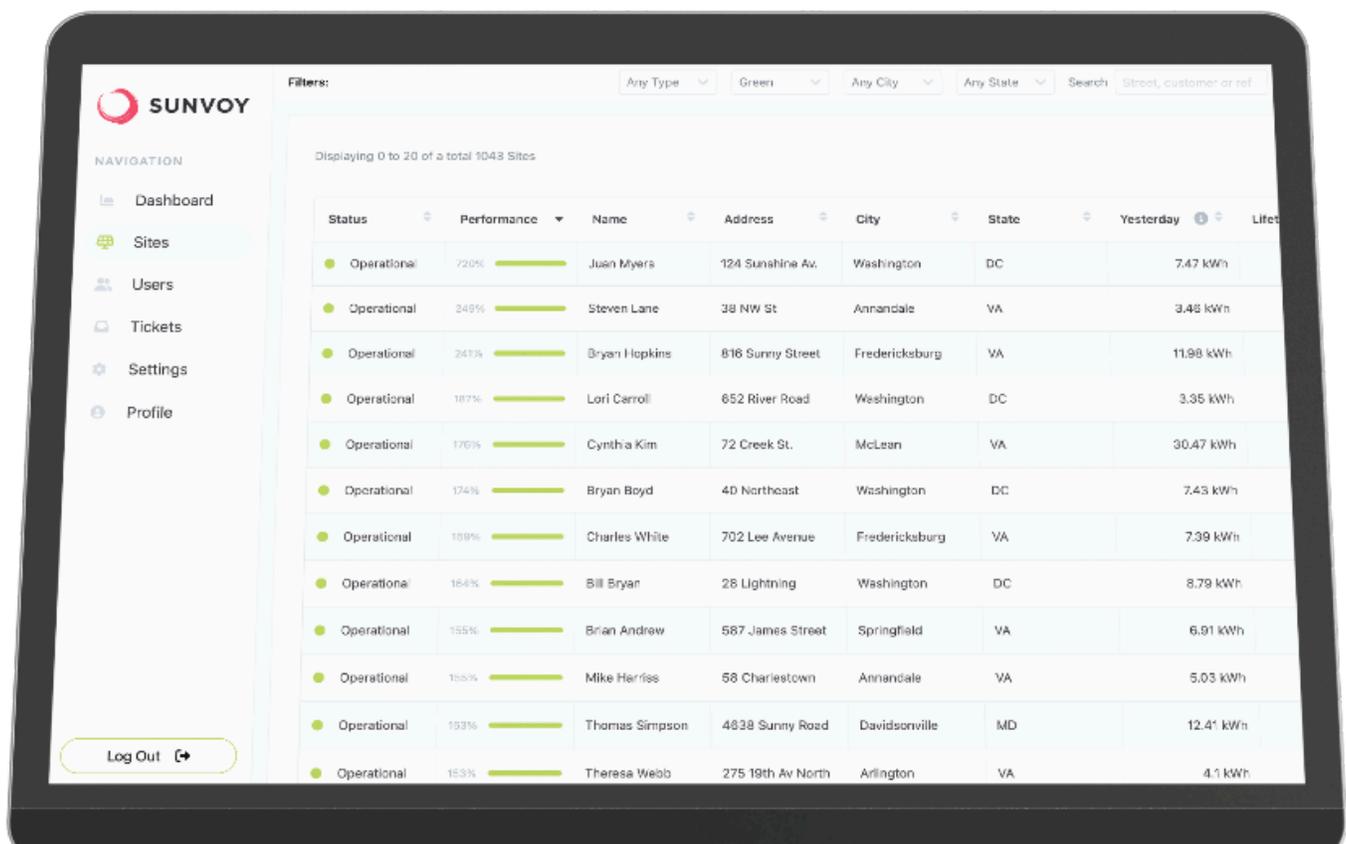
Now What?

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.

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.

Book your free audit right now →
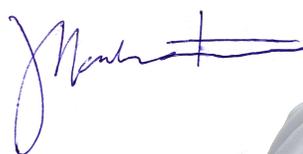
Time to take ACTION

At this point, you and your team have all the necessary information. **Now it's time to take action and apply what you've learned to ensure your company maximizes the benefits of Sunvoy**.

Simply follow this checklist:

☑ ~~Read this free whitepaper~~

☐ **Book a free audit**

☐ **Set up your own white-labeled app**

☐ **Make sure your app is published in Apple & Google App Stores**

☐ **Enable Automations for generating Referrals & Reviews**

☐ **Add access to Sunvoy as a line item at cost or markup to your proposals**

☐ **Discuss the possibility of selling lifetime active monitoring**

☐ **Make sure to enable the monthly reporting** *(Settings » Messaging » Monthly Report)*

☐ **Make sure to onboard all of your legacy customers via a Broadcast**

☐ **Make sure you are using marketing resources & landing pages**

☐ **Follow up with your team to ensure they've completed their respective action items**

☐ **Link to the app from your website**