

P L A Y B O O K

Solar Installers

Handshake Outreach email sequence, adapted.

Four messages, one sequence. Mail-merge ready.

ADAPTATION 7

Category notes

Solar has the worst sales reputation of any home improvement category, and homeowners know it. Door-to-door teams, manipulative “free solar” pitches, training manuals (like Sunrun's leaked Power Play 2.0) that explicitly instruct salespeople to “amplify pain,” and complex 20-year contracts with buried escalator clauses have made solar a category where every cold contact is suspect. The opportunity for an honest local installer is enormous. The way you win is by being the rare voice that talks straight about the difference between buying, loaning, leasing, and PPA — even when buying isn't right for everyone.

Insider terms: cash purchase vs. solar loan vs. lease vs. PPA (Power Purchase Agreement) vs. TPO (Third-Party Ownership), escalator clause, net metering, federal Investment Tax Credit (ITC — noting state of play), interconnection, true-up, NEM 3.0 in California, kWh, panel-level vs. string inverters, microinverters, production guarantee, system sizing.

MESSAGE 1 OF 4 / SEND WITHIN 4-24 HOURS

Message 1: The Honest Hello

Acknowledge the cold contact. Promise no door-knocking. Give one useful warning.

Subject: From [First Name] at [Company] – not a door-knocker

Hi –

You stopped by [Company]'s site recently. Solar in this country has earned a reputation for aggressive sales – door-knockers, daily calls, contracts homeowners regret – and I'm not going to add to that. One short note. No salesperson at your door, ever, unless you specifically request a site visit.

I'm [Name], [role] at [Company]. The most useful thing I can tell anyone in the early phase of a solar decision is this: how you finance the system matters more than which panels you buy. There are four paths – cash, solar loan, lease, and Power Purchase Agreement (PPA) – and they produce dramatically different long-term outcomes.

Cash and solar loan: you own the system, you get the federal Investment Tax Credit (where it still applies), and the system increases your home's value. Lease and PPA: a third party (Sunrun, SunPower, etc.) owns the system, gets the tax credit, and bills you monthly. Most leases and PPAs include an escalator clause – your monthly payment goes up 2.9–3.9% per year for 20–25 years. Even a 3% escalator on a \$150/month payment runs your last-year payment to over \$260. Most homeowners aren't shown the math out to year 25.

I'll send two more notes – short, focused on the actual numbers and the questions worth asking any installer (us or anyone else). Easy unsubscribe.

– [Name]

[License #, direct line, reply-to]

MESSAGE 2 OF 4 / SEND 3-4 DAYS LATER

Message 2: The Inside Knowledge

The costly signal: tell them when solar isn't right — even if you lose the sale.

Subject: When solar isn't right for your house (and we'll tell you)

[Name],

Following up. The question every homeowner should ask before a solar quote is whether their roof and bill profile actually justify it.

Three honest answers most installers won't volunteer:

First: if your roof is more than 15 years old or has shading from mature trees you don't want to remove, solar may not pay back. Panels last 25-30 years. If you'll need a roof replacement in five years, the labor to remove and reinstall the array is real money. If you have heavy shade, microinverters or panel-level optimizers help, but they don't make a shaded roof a good roof.

Second: if your monthly electric bill averages under about \$100, the math gets thin. Solar economics work best for homeowners with high consumption — typically over 12,000 kWh per year. If you have low consumption, the federal credit might cover most of the system cost, but the monthly savings won't justify the hassle for a long time.

Third: if you live in a state where net metering rules just changed (California's NEM 3.0 is the big one), the savings projections from older online calculators are wildly wrong. Make sure any quote you receive uses your state's current rules, not the rules from two years ago.

Here's the part I'd tell my brother-in-law: in our experience, about one in five homes that asks for a solar quote shouldn't get one. Either the roof's wrong, the trees are wrong, the bill's too low, or the homeowner is going to move within five years (most solar systems take 7-12 years to break even). A solar company that tells you "you're a great candidate" before they've looked at your roof and your last 12 months of bills is a sales operation, not an installer.

[Company]'s plain-English guide on cash vs. loan vs. lease vs. PPA, with side-by-side 25-year math, is at [link]. No form.

— [Name]

MESSAGE 3 OF 4 / SEND 5-7 DAYS LATER

Message 3: The Story

One real customer told to wait two years. Honesty as a moat.

Subject: The customer we told to wait two years

[Name],

Wanted to share a story.

A homeowner I'll call Marcus came to us about eighteen months ago, ready to sign. He'd been pitched by three door-to-door companies, had a folder full of quotes, and was tired of being chased. He liked our website because it was the only one that had real numbers without a form gate. He wanted us to install.

We did the site visit – free, an hour. Two things came up. His roof was 17 years old and had two years of life left, maximum. And he had a 60-foot maple in the southwest corner of his yard that shaded the best part of his array between 2pm and sundown in summer.

We told him to wait. Specifically: replace the roof first (he was going to need to anyway), and the maple wasn't worth removing. Wait two years, do the roof when it needed it, and come back to us with a 25-year-warrantied roof under a 25-year solar array. Marcus was annoyed. He'd wanted to be done with the decision.

He called us back fourteen months later when his roof started leaking. We coordinated with the roofer, did the install the week after the new shingles went on. The system has been live for three months as I write this. The numbers are tracking close to what we projected. The homeowner is happy. We made less money on him than we would have eighteen months earlier (no second labor mobilization, smaller margin), but we have a customer for life and an unsolicited five-star review that mentions we told him to wait.

I'm sharing this because the solar industry has trained homeowners to expect pressure. Honest installers are out there, and the way to find one is simple: ask whether they've ever told a customer no. The ones who can't name a specific case are telling you something.

If you want a free, no-pressure site assessment, reply or call [number]. We'll tell you what your house can do, what it can't, and what we'd recommend even if it isn't us. One more note and I'll leave you alone.

– [Name]

MESSAGE 4 OF 4 / SEND 5-7 DAYS LATER

Message 4: The Clean Close

Three options. The exit is graceful. The questions are theirs to use — with anyone.

Subject: Last note from me

[Name],

Last email unless you want to stay in touch. Three options:

If you want a real quote: Reply with your address and a recent monthly electric bill (a screenshot is fine). I'll send back a written estimate inside two business days — system size, ownership-vs-loan-vs-lease side by side, real production projections, and your actual payback in [state]. No site visit needed unless you want one.

If you want to keep researching: [Company] sends a once-a-month note — changes to net metering rules, federal & state incentive updates, and one piece of education per email. [link] to subscribe.

If [Company] isn't the right installer: Whoever you end up working with, four questions matter most: (1) is this a cash purchase, loan, lease, or PPA — and what does my 25-year cost look like under each? (2) what specifically is the production guarantee, and how is it calculated? (3) who handles the interconnection and permitting paperwork — you, or me? (4) when the install company gets acquired or goes out of business, who honors the warranty? The fourth question separates installers from sales operations more reliably than anything else.

Either way, good luck with the decision.

— [Name]

How to ship this

- **Replace the brackets.** [Company], [Name], [role], [number], [link], [state] — every placeholder filled, nothing left in template form.
- **Pick a real owner or project lead as the sender.** Not a door-knocker on commission. Use a direct line and reply-to that reaches them.
- **Render the body as plain text.** HTML email part, slightly large font (~16-17px), warmer-than-white background. Looks typed. Reads typed. People scan plain text differently.
- **Mind the cadence.** Message 1 within 4-24 hours. Message 2 at day 3-4. Message 3 at day 8-11. Message 4 at day 13-18. Then stop.
- **Honor the promise.** If you said “last email,” it's the last email. Reactance kills the relationship faster than silence.