

[Pre-recorded]

Thank you for calling Aveyo Solar. Please stay on the line and the next available Support Specialist will be with you shortly. Please make sure you have submitted the Aveyo customer form before calling in. If you have not yet submitted it, please call back in after completing the form. Thank you.

“Good morning/Afternoon, with whom do I have the pleasure of speaking with today?” (Sales rep states name).

“ _____ (rep name), thanks for calling! Can you please provide me your customer’s first and last name? _____ (collects name) Great! To confirm I have (repeats customer’s name), is that correct? (waits for yes or no, if no, correct the name with the rep) Great, and what state is this customer living in? Perfect, and last, I just need the name of this customer’s financier. Who would that be? (once they’ve heard it, repeat it back to confirm).”

“Thanks for helping me with that. As we continue the Welcome Call, I first need to locate the Aveyo customer form. Has that been submitted? Please allow me a minute to locate and review it.”

If items are missing or blurry/unclear...

“It looks like we are missing (a screenshot of the design). Can you send it in real quick to intake@aveyo.com so I can add it?”

If all items are there...

“Looks like we have everything. Can I briefly speak with the customer?”

Customer hops on phone

“Hey there! Thank you for spending just a few minutes with me. My name is _____ (support agent name) and I’ll be helping you on this short Welcome Call. I will quickly let you know that this call is being recorded for quality and training purposes.”

“Now, before I cover some of the simple informational items, can you please confirm your full name for me? (customer gives name) Perfect _____ (customer’s first name)! Great to meet you.”

“As for your decision, let me be the first to congratulate you on going solar with us. You may already know that solar power involves many talented people to do it right. Because that’s the case, you may end up seeing a few different brands over the coming weeks, like Aveyo Solar, Off Grid Energy, BlueSky, and Linkus. All of these brands are owned by us and you’re in good hands.”

“On the rest of this call I’ll confirm a few items with you, ask a few really simple questions, quickly coordinate some scheduling and then offer some brief information that I sure think you’ll find helpful. It should only take us a few minutes. Does that sound alright?”

“First, some simple questions –

I have your phone number as _____, is that right?” (Share with the customer what you on record for the customer to ensure its correct).

“And do you have a secondary phone number we can add to the account?”

Ok, I have your email address as _____, is that right” (Share with the customer what you on record for the customer to ensure its correct).

If email address is different than what is on documents state,
“Ok, I will put update the account for it to be changed.”

“Would you prefer to communicate via text, phone, or email?”

“Great news! We’re already halfway through. A few easy yes or no questions are next and then I’ll get to the scheduling and helpful information so we can wrap this up for you.”

“Do you live in an HOA?
(if yes) “What is their contact information?”

“Was there anything that you and your solar consultant discussed outside of our normal install agreement?”
(IF YES) - Thank you we have noted that down. Just so you know anything that was promised outside of the install agreement will be between you and your sales rep. Do you understand the company is not responsible for those promises?

“Do you understand that as a solar customer you will remain connected to your current utility company and that you will continue to receive monthly statements with your net electricity usage?”

(If this is unclear, allow the sales rep to explain and then ask again)

“Do you understand that these statements will include any applicable solar connection fees and you will be responsible for any additional electricity consumption beyond what your solar system produces?”

“Are you aware that our agents are not tax professionals?”

Ok let's get your site survey scheduled. Our next available time is _____ does that work for you? Great, this is a window of arrival. Our tech should show up sometime within that hour and the survey usually takes about an hour to complete.

As a heads up someone age 18 or older needs to be present for the site survey and our surveyor will need access to your roof, attic, and main electrical panel. If you don't know where those are, that's okay! Just let the surveyor know and they can take care of it."

Just to reiterate, Your site survey is confirmed for (Give Date and Time.)

Do you have any questions about your site survey?

If "NO" – move to next paragraph

If "YES" – "Sure thing! I'd love to help. Keep in mind, if there's a question I don't know the answer to, I'll make sure I help get you an answer. What questions did you have about your site survey?"

"Okay, after site survey is when things a bit boring for you and really exciting for us! We start by submitting your design to our engineers, applying for your city or county permits, and even start the process to get your net metering setup, which is what allows the utility company to give you financial credit for the clean power your roof will soon be generating! This process typically takes 30-45 days to complete, but can vary depending on how quickly (or slowly) these third parties take to review your project. We'll do our absolute best to send you updates along the way and keep you informed as we make progress! But remember, it does require a bit of patience. I promise we know how that feels. After all of that is completed, however, we'll reach back out to schedule your project on our installation calendar.

I'm grateful for your time! Do you have any final questions for me?"

If "YES" – (answer what you can or make note of questions you do not know then proceed to "no")

If "NO" – "If you think of any additional questions our customer service line is 844-458-8787. Call us anytime!"

"Once again, we appreciate you and are here anytime if you need us. Thank you for choosing Aveyo have a great day."