

SOFTWARE THE SOLUTION FOR CUSTOMER MANAGEMENT

Customer relationship management systems are vital to the ongoing success of growing solar companies. Solar eCRM offers a range of solutions from quoting to lodgement that allows a company to focus on profitable growth.

BY MOUNESH BADIGER,
SOLAR ECRM

Solar eCRM is an entirely online, cloud-based solar quote builder and operations manager.

THE AUSTRALIAN SOLAR industry is going from strength to strength, and getting more and more competitive at the same time. There is great potential for small and large companies alike to capitalise on the opportunities arising from this type of market, but in any growing business, stretching company resources too far and trying to service more customers than the infrastructure can handle often negatively impacts growth and profits.

It's important to have systems in place that enable solar companies to focus on profitable growth, and handle the increased workload that comes with a growing business, before they over-reach.

From discussions with industry colleagues and our own experience, we've learnt that most businesses in the industry have very similar wants – happy customers, sales growth, profit, adherence to compliance and smooth operation, without a huge back office. Unless companies are constantly paying attention, many of these can fall to the wayside and problems can begin to occur.

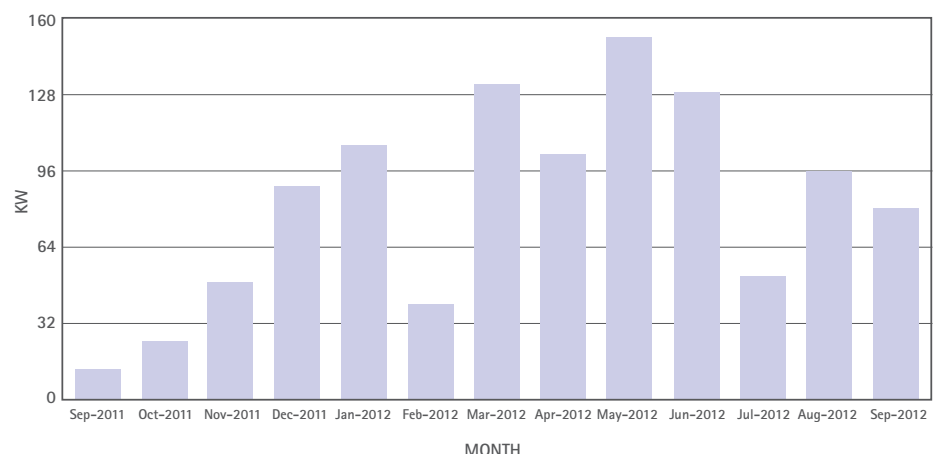
Losing track of expensive leads, becoming buried in order processing paperwork and being unaware of inventory or Small-scale Technology

Certificate (STC) status are all issues that can chew up valuable time and cause serious damage to a business. Managing solar industry-specific leads, preparing superior quotations in large volume, tracking orders to perfect execution, focusing on profitability at all levels and meeting internal and regulatory compliance from quoting to lodgement – all this is possible with the Solar eCRM product.

Ideally, solar companies will send a professional-looking solar quote that contains all of the answers that the customer could possibly want. The difference between getting the job and losing the client can rely on the quote sent out. For example: a customer wants to know if a 4 kilowatt (kW) system will fit on their split roof. Is it any good putting solar panels on the west side of the roof, and how much power will be lost? Does the customer need a 2 kW or 3 kW system if panels are on the east side to meet is 10 kW hours of daily needs? What are the savings over 25 years? What is the payback period?

Think about how long it would take to prepare a quote answering all of these questions and more. Add to that the time it takes when the customer wants a few more options, if something was forgotten on the quote or something was quoted incorrectly.

MONTH BY MONTH SALES REPORT
Chart showing last one year sales, group by month.



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These sorts of scenarios are all far too real in the solar industry. The makers of Solar eCRM know this – it is based on our experiences in the industry. We discovered very quickly that we needed a proven system that could handle all of these scenarios so that we could spend more time helping our customers.

Solar eCRM is an entirely online, cloud-based solar quote builder and operations manager. With just a few trained staff, what was once a time-consuming and costly endeavour can now be done in a matter of seconds with nothing more than an internet connection. Born out of the need for easy, accessible and customisable quoting software, we have built Solar eCRM from the ground up to meet the solar industry's needs.

After we noticed a lack of easily modifiable, off-the-shelf systems available in the market, we decided to put one together ourselves. Since its inception, we have used and improved upon the Solar eCRM program using our own business dealings as a means of testing which features we would need and which areas require particular attention. Through using the program in our own business and steadily evolving it to meet both our needs and those of the industry at large, today it is a full-blown

product offering good logistics and scheduling of installers to efficiently complete as many installs in a week as possible.

Through the linking of all aspects of the job, Solar eCRM allows information to be provided directly to the installers – including roof pictures, which kit they are to pick up, and any customer communication regarding the job – ensuring the information they receive is both accurate and up-to-date. Automated documents such as electrical work requests, connection forms and STC claims, as well as feedback and sign-offs from both the installer and customers, can be submitted online to ensure a speedy finish to the job.

While being able to track margins at job level or sales representative level is highly useful, other benefits of the online system that help us enormously include:

- » The monitoring of orders pending installation by date
- » Ensuring checklists at multiple stages
- » Reviewing cancelled orders and back data
- » Detailed statistics on sales trends for a suburb allowing for a promotional campaign
- » Monitoring of high-performing sales agency and dollars per kW margins
- » Listing and alerting you to installs remaining unpaid
- » Orders waiting for energy company approval.

Solar eCRM was designed and built by the solar industry, for the solar industry, and is intended to assist customers, achieve greater profits and streamline operations for an organisation. The set-up process of the software is a simple online registration, meaning that companies can start sending well-designed quotes and managing jobs more effectively in a short space of time.

Solar eCRM SOLAR POWER SYSTEM QUOTE QUOTE REF: Q00005.1
Quote Expiry Date: 25-09-2012

Quote Summary - Q00005.1- Finance Offer.

Customer	Product	Pricing
Name: Steve Anderson Address: 136 Blyth St Brunswick East, VIC 3087 Phone: 12345 E-Mail: sstabenath@yahoo.com	System Size: 2.00 kW Inverter: suasa Panels: 6 x 333 W Mono Brand: ca	Net Price Estimate: \$3,717.50 PAYMENT PLAN: 24 Months (Subject to approval by licensed external credit company)

Dear Steve
Congratulations for being energy smart and money wise! Thank you for considering our Solar Electricity Systems, we are delighted to assist you in your energy saving plans! There has never been better time to make the sun do the work for you.

Quote Summary - Q00005.1- Finance Offer.

System Size	Average kWh Produced Daily*	Annually	Annual Savings* with your Feed-in Tariff	Total Savings After 5 Years	Total Savings After 25 Years
2.0 kW	7.2	2628	\$657	\$3,256	\$53,405
3.0 kW	10.8	3942	\$986	\$5,784	\$80,107
5.0 kW	18	6570	\$1,643	\$9,640	\$133,512
10.0 kW	36	13140	\$3,285	\$19,281	\$287,023

According to the Clean Energy Council (www.cleanenergycouncil.org.au), the average Australian household uses around 17kWh daily and would benefit most with a 4.5 kW system.

The size of your solar PV system will depend on:

- The physical unshaded roof area available for installation of panels
- How much you want to invest, and
- What is your aim, to kill the bill for example?

The average size of our installs is around 3kW due to roof size and personal choice of our customers.

Do you want to offset your usage, or have enough left over to sell to the grid? This process can be completed by your accredited designer during the design and specification stage.

Why Choose Solar: It is a proven way to protect yourself from rising electricity costs (cost effective too!)
Why Go Solar Today: The longer you wait, lesser the rebates and government incentives. You can start saving sooner but ACT FACT: our package offer is only valid for limited time.
Why Go Solar with company1: We are one of the few Australian companies proving top-quality Solar panels. With proven high performance efficiency, product life and workmanship covered in warranty, you can be confident that your investment into solar energy is sound, and you will see the benefits pay off sooner.

Below are the quick and easy steps:

- 1 Reply to this email confirming the order.
- 2 Print, sign and fax the attached quote as an order.
- 3 If paying by direct deposit, advise the details of deposit payment.

easy steps

Congratulations for taking the first big step to Green Living and for making a very smart investment.

sales1 sales1
Sales Team
Thanks and Best Regards
company1
666, 5, test street, VIC, 9999
Ph: 12345 Fax:
Email: test@testmail.com

Solar eCRM Lock Professionals & the Public

1, Linton Street, BERWICK, VIC 3866
Ph: 03 93027222 Fax: 03 93022221

Solar Power System Quote Date: 31-08-2012

Quote No: []

Customer Details

Name: Robin James
Address: 1 Linton Street BERWICK, VIC 3866
Phone: 233232
E-Mail: robinj@gmail.com

REC-Zone Details

REC Zone: 8

Product Details

System Size: 3.50 kW
Inverter: JSM 1500
Panels: 8 x 437 w
Brand: CAJACKIAN

Site Details

Roof: TFL-Flatbed
Storey: SINGLE

PRICING

Full System Price:	\$3,000.00
Rebate (30% @ \$25,000):	\$750.00
Price after Rebate:	\$2,250.00
Discount 0%:	\$0.00
Price after discount:	\$2,250.00

Extras

Total:	\$3,000.00
Minimum Deposit:	\$300.00

Current Status: New [Change Status](#)

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