

THE EVERYTHING · FIELD GUIDES FOR TRADE BUSINESSES

The AI Solar Playbook

How to run a solar installation business in the age of AI

— and win more of the quotes you're already on.

THE COMPLETE SYSTEM · NO FLUFF · FREE TO SHARE

THE EVERYTHING

Read this first

Ten years ago, running a proper solar business meant someone on the phone, a bookkeeper, and still working out the system size, the rebate and the roof loadings on a scrap of paper in the ute between site visits.

Today, a one-crew installer with the right setup answers every enquiry the moment it lands, quotes straighter and more honestly, follows up through the weeks the customer is comparing — and signs more of those three-quote shortlists than a ten-crew outfit across town. And he spends zero nights on paperwork.

He's not smarter than you. He's not a better installer. And he's definitely not a computer person — one of the best we've seen was still pricing jobs on a pad on the passenger seat two years ago. He just worked out one thing before everyone else: **the boring half of the business** — the enquiries, the follow-ups, the honest quotes, the rebate paperwork, the deposits and progress claims, the invoices, the compliance and connection records — can now do itself. So he put his energy where the money is: on the roof, and on turning cautious, quote-shopping buyers into customers who sign and refer.

This is the playbook for how he does it. No “50 prompts to copy”. No tech-bro nonsense. The actual system — how to think about it, what to set up, in what order, and the mistakes that make good installers give up before it clicks. Read it start to finish and you'll run a tighter, more profitable solar business than you do right now, even if you never spend a cent on software.

A STRAIGHT WORD ON WHAT STAYS YOURS

Nothing in here promises a household a set saving, guarantees what a roof will produce, or decides the system design — and it never replaces your assessment at the property, your accreditation, or the electrical standards you sign off against. It carries the admin. Whether the roof and switchboard are sound is a skill call; what a system will realistically save is a modelled judgement, not a promise; who foots the bill and on what terms is a contract; and what design goes on, at what rating, is bound by the standards and your accreditation. All of it stays yours, start to finish.

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01

CHAPTER ONE

The New Playing Field

Someone who's just opened a scary power bill, or watched the neighbour's panels go up, or bought an EV, can't tell a good installer from a dodgy one. They judge you on what they can reach — and that's where most solar outfits quietly lose the best work of the year.

Nobody rings in a panic — this is the opposite of an emergency trade. They've been thinking about it for months, they'll get three or more quotes, and the thing they're most afraid of is being ripped off. They ring down the list, but they decide over weeks. The job goes to whoever gets three things right first:

- 1 Did you respond first — and set the tone?** The first proper response wins the meeting and the anchor: roughly 78% of buyers end up going with whoever answered first, because that first proposal is the number every later quote gets judged against. Slow to reply and you're the third quote nobody remembers.
- 2 Did you sound honest, not pushy?** Whoever gives the straight answer — “I can't price this properly until I've seen your roof” — and happily invites them to compare owns the trust. A “sign today” pitch reads as a scam here, not a bargain.
- 3 Was dealing with you easy — and will you still be here in ten years?** A real local address, an accreditation number they can check, real reviews, a written scope after a proper look. In a trade where hundreds of operators have folded and left customers stranded, above-board and built-to-last wins the job.

Notice what none of those are about? How neatly you run the crew. All three are about being reachable, sounding honest and running the admin — the exact stuff you hate at the end of a day on the roof. And here's the bit nobody's telling you: the other side already runs on AI. The question isn't whether AI comes into solar — it's whether it's working for you or against you.

The good news? This is the first time the technology favours the small operator. The big firms rolling up the trade run committees, rollouts and training programs. You can decide on a Tuesday and be responding first by Friday. The playing field just flipped: the small, fast, honest installer can now look and perform like the national brand — without the national brand's overheads.

“But I'm not a computer person”

Neither are the trades doing this best. One of the fastest adopters we've seen is a trade-business owner with 26 years on the tools who only picked up a computer three years ago. His words: **“Don't worry about spelling. Don't worry about grammar.”** If you can send a text or leave a voice message, you can run everything in this playbook. Being able to say what you want is the new requirement — and installers, who talk a cautious buyer through their options every day, are already good at that.

**\$200–
800**
+ per month

What design, quoting and job-management software commonly charges in AUD — and it still makes you do the typing and the chasing. One owner was paying a grand a month for tools his team barely used. Everything in this playbook either replaces that spend or makes it earn its keep.

The firms three times your size are slow because they're big. That's your opening. This playbook is about walking through it.

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CHAPTER TWO

Think AI-First

Before we touch a single tool, we need to fix how you think about this — because the biggest mistake isn't buying the wrong software. It's bolting AI onto your old way of working and wondering why nothing changed.

Every process in your business was built on one assumption: a human has to do each step. Someone answers the enquiry. Someone works up the design and types the quote. Someone chases the deposit and the connection paperwork. Your whole day is shaped around that assumption — and that assumption just died.

Don't automate your old process. Re-draw it — with the AI touching everything first, and you supervising. Three mental shifts:

Shift one — delegate outcomes, not steps

Stop thinking “which buttons do I click”. You now talk to your business the way you'd talk to a good apprentice: say the outcome, let it work out the steps. One owner reorders stock by sending one message from the wholesaler counter — “grabbing the rails and two inverters for the Nguyen job” — and the order, the expense and the books sort themselves.

Shift two — AI first, you second

The AI does the first pass of everything, and you approve, tweak or overrule. The quote is drafted before you sit down. One customer described it: **“Nine times out of ten it's perfect. Just go — yep, send.”** Your job shrinks to ten seconds of judgment, not forty minutes of typing.

Shift three — corrections are investments

With normal software, you fix the same mistake forever. With AI, you fix it once. Tell it a standard quote carries the switchboard check, that a shaded roof should always get the optimiser option, and that you never promise a firm saving before you've assessed the roof — it answers, **“I'll remember that from now on.”** Every correction compounds. Six months in, it quotes like you, writes like you and knows your rules — because you taught it, once.

The re-imagining exercise

Walk your business and ask one question about every interaction: “What would this look like if the AI touched it first?”

INTERACTION	THE OLD WAY	AI-FIRST
Enquiry lands while you're on a roof	Voicemail. Lost to whoever replied first.	Answered and qualified, site assessment booked — an honest range drafted by morning.
Wrong gear turns up from the wholesaler	You notice on site, chase the counter, lose the slot.	Flagged against the job, re-ordered automatically — you hear only if it slips again.
Wholesaler's price-list update lands	Buried under 200 emails. Old rates on your next quote.	Extracted, applied to your rates — “panels and inverters up on six lines.”
Job finishes	Invoice “tonight”. Battery never offered.	Progress claim sent from the van. Battery and monitoring offered while they're happy.

Every chapter from here is just this exercise applied to one part of your business.

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CHAPTER THREE

Never Miss a Job Again

Let's start with the leak that costs you the most and hurts the least — because you never see the bill.

The highest-value work in solar doesn't arrive as an emergency. It arrives as a considered enquiry from someone who's going to collect three quotes over the next month — and it's perishable in a way that has nothing to do with panic. Whoever responds first wins the meeting and sets the price anchor. Whoever's slow becomes the forgotten third quote. The enquiry buzzes in the van at 4pm while you're on a roof. It rings out. That buyer rings the next mob on the list, and now they set the anchor instead of you. Gone.

78%

buy from the first to respond

Conversion is up to eight times higher inside the first five minutes, and a lead loses most of its value if you don't reach them fast — because the first proper proposal sets the anchor every later quote gets judged against. A missed enquiry isn't a deferred sale — it's the anchor, and usually the job, handed to a competitor. And slow response drags your search ranking down, so it costs you the next one too.

The buyer who's ready to spend doesn't leave a voicemail. They ring the next mob. Voicemail is where the best jobs of the year go to die. The AI-first fix is bigger — because an enquiry is really two problems.

Problem one — the enquiry you couldn't take

An AI receptionist answers in your business's name, 24/7, sounds calm and normal on the phone, and captures every detail — roof type, rough power usage, whether they want a battery, who owns the property — while you're on a roof or asleep. And it does the thing that wins the anchor: it responds first, every time, so you're the number the other quotes get measured against.

Problem two — the follow-up nobody made

A solar deal isn't won on the first call — it's won in the weeks that follow, while the buyer collects their other two or three quotes. Most installers respond once and go quiet. The one who keeps in honest contact — answering “why isn't yours the lowest price?” and “will you be here for the warranty?” — is the one still standing when they sign.

- ✓ Every enquiry answered in your business's name — including 6pm, including Sunday, including the week a rebate deadline has every solar phone in town ringing at once.
- ✓ A searchable record of every call — “what did we agree about the battery and who's paying the deposit?”
- ✓ Follow-ups that fire across the whole comparison window — day 2, day 7, day 20 — so you're the quote they remember, not the one that went quiet.
- ✓ Job details from the enquiry — usage, roof, access, who owns the property — flow straight into the job, not re-typed three times.

The phone stops being the thing that costs you the best jobs and becomes the thing that books the assessment — and keeps you in the room through the weeks they decide.

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CHAPTER FOUR

Quote Before You Leave the Driveway

Solar has a quoting trap most trades don't: the honest answer to “how much will I save?” down the phone is often “I can't say properly until I've seen your roof” — and out of your mouth that can sound like a dodge.

No firm price

down the phone

You haven't seen the roof, the shading, the switchboard or how they use power. A shaded east-west roof, a simple north-facing one, a tile roof that needs extra labour, a switchboard that needs upgrading — wildly different work and cost, and none of it knowable from a satellite photo. A firm phone price — or a “guaranteed” saving — is a guess. It's also the exact move the dodgy operators make: guess high and you lose the job; guess low and you either eat it or hit them with a variation at the door that torches trust and the review.

So the honest operator quotes the *structure* confidently and defers the *number* honestly: a real site assessment, then a design and written quote naming the actual gear, with a realistic savings range and the assumptions shown. A fixed all-in saving quoted sight-unseen isn't confidence — it's the amateur tell, and buyers have learned to read it as the scam marker.

AI-first quoting makes that easy: the AI *qualifies* the job before a crew rolls. Here's what that looks like in a real solar business today.

- ✓ **It asks the right questions first.** From the enquiry, the AI works through what actually sets the price — roof type and orientation, rough power usage, whether they want a battery, and who owns the property — so you book a real assessment, not a maybe.
- ✓ **It prices from YOUR structure.** Feed it your past jobs and it learns your per-kW rates, your battery pricing and your roof loadings — and gives an honest bounded range with the rebate already shown coming off, not a number you can't honour.
- ✓ **It catches what you forgot.** It doesn't get tired and leave off the switchboard upgrade, the monitoring, or the fact that a heavily shaded roof needs a different inverter.

Up to 7x

more from a stored kWh

Here's why the assessment matters, not the phone guess: with feed-in credits now only a few cents, a unit of power the household uses itself is worth several times one it exports — up to about seven times. So the real saving hinges on how and when that home uses power, which you can only model properly after a look — and it's why a battery, storing your own power to use later, changes the whole picture.

The written on-site scope isn't red tape — it's the sell

Because the honest number depends on what you find at the property, the move is to book the assessment now and put the price in writing after it, before anyone signs. Framed right, that's not a delay — it's the thing that tells a cautious buyer you're not the operator who guesses high on the phone and hopes. “We give you a written quote after we've actually seen your roof” turns your honesty into the reason they picked you.

Then the bit everyone skips — the follow-up. One message, a few days later: “Just checking you got the design and the savings range.” That single message wins more jobs than dropping your price ever will. AI-first, the follow-up isn't a habit you build. It's a thing that just happens.

THE POINT ISN'T THE SOFTWARE

It's the standard: qualify before you roll, never quote a firm saving you haven't modelled, put it in writing after a real look, follow up through the whole comparison window. An installer with a notepad who hits that standard beats one with an app who doesn't. The AI just makes the standard effortless.

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CHAPTER FIVE

Get Paid Without the Awkward Chase

You've won the job. Now you've got to get the money — and in solar that's rarely one invoice at the end. There's a deposit, a progress claim, sometimes finance, and a rebate that comes off the price up front and confuses everyone.

The rebate

off the price, up front

The federal solar rebate isn't a cheque the customer chases later — it comes straight off the price: the system earns the credits, you claim and trade them, and the discount shows on the quote up front, so the customer files nothing. The dodgy operators quote a big “rebate” off an inflated sticker price so the after-rebate number looks like a steal, or overstate what the rebate's worth. Show the price after the rebate, show what the rebate actually is, and don't dress it up as a limited-time gift — that honesty is a trust play the customer feels.

The chasing is a system problem, not a people problem. Fix the system and you never have the awkward conversation again.

- 1 **Take the deposit the moment they sign.** A card tap or a “pay now” link when they agree beats “here are our bank details” — and it locks the job in against the other two quotes.
- 2 **Bill the progress claim automatically.** Deposit on signing, then the balance on connection — or the finance drawdown — billed on the agreed points, so nobody has to remember.
- 3 **Offer honest finance, no hidden markup.** If they finance, the rate and terms are on the table — never a lender's referral fee quietly rolled into the price, which is the thing the dodgy operators do.
- 4 **Escalate the tone only if you have to.** Most pay on nudge one or two. You stay the good guy the whole way.

Money is money: this is the one place you keep the AI on a short leash at the start. It drafts, you approve — until you've watched it be right for a month.

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CHAPTER SIX

The Inbox That Runs Itself

Your inbox is where quiet money leaks out and stress leaks in.

Wholesaler statements, product data sheets, the network operator approving a connection, a builder chasing a connection date before handover, a customer asking about their monitoring, rebate forms, price-list updates — all mixed in with junk, all landing while you're on a roof with a drill in one hand and a rail in the other. One trade owner started with a backlog of 24,000 emails: “I'd read one email, it'd get lost. I wouldn't even be able to find it again.”

AI-first, the inbox becomes something that's already handled by the time you look:

- ✓ **Triaged.** The three emails that matter today float to the top, flagged with why — “this one's the network operator approving your connection.”
- ✓ **Drafted.** Routine replies — “yes, we install batteries with new systems”, “we're booked into next month” — written and waiting. You glance, tweak, send.
- ✓ **Answered on demand.** “What did we quote the Rossi job for the 10 kW and the battery?” — and it finds it instantly.

THE PART NOBODY EXPECTS — IT GUARDS YOUR MONEY

Because the AI reads everything, it catches things. One business: “It's already saved me thousands in mis-ordered products — it said, hold on, based on your past jobs you probably want this one.” Another had a supplier accidentally invoice at a 50% discrepancy — flagged automatically before it was paid.

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CHAPTER SEVEN

Your Digital Office Manager

Every solar business has an office manager. Usually it's you, doing it badly at 10pm.

One week

no office admin

One trade business's admin person went on leave for a week. The owner: "We haven't had her in the office for a week, and it's helped us do her job." It ended up being one of their strongest weeks — not survive the week, one of their best — because the follow-ups and the chasing didn't stop when she did.

The morning brief

Before you turn the key: today's jobs in order, which install is waiting on gear from the wholesaler, which enquiry should get a follow-up today, who to chase for a deposit, and the one connection form that'll bite you if you forget it. Two minutes with a coffee — and your offside knows too.

Job files that build themselves

Every photo, design, quote, assessment note and email attaches itself to the right job — so when the customer rings in eight months about a battery, the whole history's there. The enquiry, the assessment, the shading you noted, the warranty terms, the connection approval — all in one place.

The paperwork without the dread

The assessment record, the electrical compliance, the connection paperwork, the handover pack for the commercial account — prompted, captured against the job, and kept where you can find it. Never invented for you, and never a substitute for your own assessment at the property — just stopped from going missing.

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CHAPTER EIGHT

Look Twice as Big as You Are

Here's a secret the big firms rely on you not knowing: most of “looking professional” — and “looking like you'll still be here in ten years” — is presentation, and presentation is now nearly free.

A one-crew installer and a fifty-person outfit can send the identical, spotless, branded quote and design — and show the same real address, the same checkable accreditation and the same real reviews. In a trade where the buyer's biggest fear is you folding before the warranty ever matters — and hundreds have — the small operator who looks built-to-last gets trusted like the big one, and can charge like it.

The referral flywheel — on purpose, not by accident

- 1 **Retain** — make the whole job easy, honest and clear, and keep an eye on their system, so you're the one they call when they want a battery, not a stranger.
- 2 **Review** — ask for the Google review the moment they're happiest, the first sunny quarter their bill drops, automatically, with the link. Reviews and fast response lift your ranking — and a cautious buyer leans hard on them.
- 3 **Refer** — the system you did for one house gets you the neighbour who watched it go up; a good job for one builder gets you their next builds; one happy business gets you the one next door.
- 4 **Resell** — this is the whole game. Feed-in credits have collapsed, so every past solar-only customer is a warm battery re-sell — store your own power instead of near-giving it away — then the EV charger on the same switchboard, then monitoring almost no competitor offers. It's all in the job file. A reminder at the right time turns one install into a decade of work.

START TODAY — EVEN WITH ZERO TECH

Ask every happy customer for a review before you pack up, and always ask the one question that opens the ladder — “want me to keep an eye on it, and talk batteries when the numbers suit you?” A customer who just got the honest result you promised is the most receptive you'll ever find them.

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CHAPTER NINE

The 30-Day Switch

Everything above works. The reason most installers don't get it working is they try to do it all at once, get overwhelmed mid-job, and go back to the old way. So: one thing at a time, without stopping work.

- 1 Week 1 — Stop the biggest leak: response time.** Every enquiry answered and qualified, the site assessment booked, follow-ups firing across the comparison window. This starts paying for the whole exercise immediately.
- 2 Week 2 — Fix quoting.** The AI qualifies the job and gives an honest, rebate-inclusive range from your structure; you correct it — and every correction is a lesson it keeps. Written quotes after a real assessment, with the follow-up every time.
- 3 Week 3 — Fix getting paid.** Deposit on signing, progress claims on a cycle, honest finance, automatic reminders — with you approving everything money-related until it's earned the leash.
- 4 Week 4 — Hand over the back office.** Inbox triaged and drafted, morning brief running, job files and compliance building themselves, reviews asked automatically, battery re-sells flagged.

Why all four? Because one process never feels like much. Three is where the “holy hell” moment happens — because that's when the pieces start talking to each other. The enquiry becomes the assessment. The assessment becomes the job. The job becomes the deposit, the review and the battery re-sell.

The trust dial — how to hand over without losing sleep

You don't hand a new apprentice the van and a job on day one. Same here:

- 1 **Weeks 1–2: it asks about everything.** Every email draft, every quote — “here's what I'd send, OK?” You approve, correct, teach.
- 2 **Weeks 3–4: it asks about the important stuff.** Routine replies just go; money, new customers, and anything with weight — quotes, savings numbers, warranties — still get your nod.
- 3 **Month two onward: it asks about exceptions.** Now it runs, and you get the morning brief and the flags. You're still the boss — you've just stopped being the bottleneck.

The mistakes that make good installers quit before it clicks

- ✓ **Doing all four weeks at once.** Don't. One a week. Each banks a win before you add the next.
- ✓ **Bolting AI onto the old process.** If you're still typing every job into the same old software and asking AI to “help”, you've missed the point. Re-draw the process (Chapter 2).
- ✓ **Reaching for fake urgency.** The dodgy operators use “sign today”. You've got a real lever — a genuine rebate step-down deadline — so use that, and let honesty do the pushing.
- ✓ **Promising to win the deal.** The moment you promise a set saving or a bill that vanishes, you sound like every operator they've been warned about. Your honest range, assumptions shown, is what wins the cautious buyer — the refusal to overclaim IS the pitch.



BEFORE YOU PUT THIS DOWN

The 2-Minute Leak Audit

Most solar installers aren't short of skill — they're losing quotes they're already on. A typical small installer does only around 200 installs a year, but each one is worth thousands, and every one is a contest against two or three other quotes. That's the tell: the money isn't in chasing more leads — it's in winning a bigger share of the quotes you already give. Lift your close rate from roughly one in six of your quotes to one in four and you don't just earn a bit more — you roughly double your profit on the same leads, because the cost of getting each quote is already spent. Be honest — tick the ones that are true right now.

- ✓ I'm often slow to respond to enquiries — and I don't know how many jobs the delay has cost me.
- ✓ An enquiry has gone to voicemail and I never knew the phone rang.
- ✓ I've given a firm price or a “guaranteed” saving down the phone before assessing — or lost a job because I wouldn't.
- ✓ I don't always follow up across the weeks a buyer is comparing quotes.
- ✓ I win a job, install it, then never go back to offer a battery, EV charger or monitoring.
- ✓ I've quoted without a proper look at the roof, shading and switchboard.
- ✓ I leave the rebate paperwork, compliance and connection admin to the last minute.
- ✓ I only push jobs when a rebate deadline is looming — never a steady honest run at it.
- ✓ My inbox stresses me out, and important stuff gets buried.
- ✓ If a past customer rang about their system, it'd take me a while to find the details.

0–2

Tight ship. A few tweaks and you're winning more of your shortlist.

3–6

You're losing real quotes in the boring half — and it's all fixable. Start with Week 1.

7+

Mate, you're doing the hard work and handing the deal to whoever looks safer and follows up. Good news: it's exactly the stuff that's now easiest to fix.

The biggest lever isn't more leads — it's winning a bigger share of the quotes you're already on, and turning each install into a battery, an EV charger and years of service. Your biggest tick is your biggest opportunity. Start there.

Want it set up for you?

Everything in this playbook, you can build yourself — and you should, if you've got the time and the patience. Plenty do. If you'd rather it was just done — the AI that answers your phone the moment an enquiry lands, qualifies it and books the site assessment, drafts an honest savings range with the rebate shown, takes the deposit and bills the progress claims, keeps the compliance and connection records, follows up through the weeks they're comparing, and turns each install into a battery, an EV charger and years of monitoring — all in one, working in your solar business this week — that's what we build. It's called .

- ✓ 14-day free trial. Cancel anytime. No fixed contracts, no catch.
- ✓ Nothing important — a quote, an invoice, a customer message — ever goes out without you seeing it first.
- ✓ It lives in Microsoft Teams and the tools you already use.

See it working on your own jobs at the-everything-app.com — no credit card to look.

Honest note: this won't fix a broken business, and it won't promise a household a set saving, guarantee what a roof will produce, or make your power bills disappear — that's still you, your assessment and your accreditation. What it fixes is the office job you've been doing for free after dark.