

THE RECURRING WORK AUTOMATION REMOVES

What we take off your plate.

Solar

Every business has a set of tasks that repeat forever. None of them are hard. All of them have to happen. And every one competes with the work that actually earns money.

Each signed customer has already cost \$3,000 to \$7,000 to acquire. Then the deal waits weeks or months for survey, design, permit, install, inspection and interconnection. The homeowner hears nothing, the rep has moved on, and cancellations land in the gap. Meanwhile the market is shrinking. Residential installs fell 12% year over year in Q2 2026 and are forecast down 21% for the year. The federal 25D credit ended for systems placed in service after December 31, 2025, and the savings pitch has to be rebuilt without it. The companies still standing will be the ones that stop losing the deals they already paid for.

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The Signed-to-PTO Engine

Disclosure-clean contracts, a live path from signature to Permission to Operate, and a base that keeps referring

RECURRING TASK	HOW OFTEN	AUTOMATE?	WHAT CHANGES
Work new leads before the next dealer does	Every lead	Full	Text and email in under 60 seconds; the setter-to-closer claim window keeps attribution.
Return missed calls from ads, marketplaces and door hangers	Daily	Full	Missed-call text-back with a booking link.
Confirm appointments and cut no-shows	Daily	Full	Confirmation and reminder sequence; reschedules without phone tag.
Follow up on unsold proposals	Days 1-7, then monthly	Full	The rehash lane replaces the closer's memory.
Send the disclosure packet and chase signatures	Per deal	Partial	The gate will not advance a deal without it; a human still reviews the contract.
Welcome during the cancel window	Per deal	Full	Calm what-happens-next sequence; cancellations alert the owner.
Homeowner status calls: "where's my permit?"	Weekly per deal	Full	Milestone updates go out before they call.
Reps asking ops where their deals stand	Daily	Full	The Rep Deal Board answers it.
Permit and interconnection stall chase	Daily	Partial	Stall Board flags; portal submissions stay human.
Finance turn-downs	Per financed deal	Partial	Tagged lane instead of the deal dying silently.
Review request	Per PTO	Full	Fires at PTO with a second ask.
Referral ask and neighbor marketing	Per PTO + 30 days	Full	Per-rep QR cards and a referral ladder.
Storage and add-on outreach to the installed base	Quarterly	Partial	Campaign runs; the closer takes the call.
Milestone-pay inputs for payroll	Per pay cycle	Partial	Milestone dates export; payroll approves.

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Continued

RECURRING TASK	HOW OFTEN	AUTOMATE?	WHAT CHANGES
Weekly knock/set/sit/close numbers	Weekly	Full	The owner's report replaces the whiteboard.
Owner-routed onboarding	Per new client	Full	Every new client gets the welcome from their own rep: the rep's name, the rep's email and the rep's own sign-up link, so the file lands in that rep's queue. One message per client, never duplicates. For you: per setter / closer. (Growth and up.)
Secure two-step sign-up	Per new client	Full	Clients never email sensitive data. The welcome sends them to a secure form that files everything directly into the system of record, and the email says plainly: don't email this to us. For you: utility bill and credit data by secure form. (Growth and up.)
Commission ledger	Monthly	Full	Commissions calculated from money actually collected, not signed deals, using your own plan rules (splits, first-half / second-half payouts, clawbacks, lead-type rates), with a monthly statement per rep and a 'needs attention' list. For you: setter / closer commissions tied to milestone funding. (Full Engine.)
Payment processor migration	One time	Partial	Every paying client moved off a processor that closed or is being replaced: new payment links or card-on-file, old invoices cancelled only after payment clears, so nobody is double-charged or dropped. (Add-on, any package: \$900.)
Typical reclaim	Measured in your own time audit (Section 9 of the intake packet) – we don't quote an hours figure before we've seen yours		

THE SEAT THIS DEFERS

A solar project coordinator runs about \$75,000 a year loaded

ZipRecruiter puts the role at \$59,915 (July 2026); add 25% for taxes and benefits. Full Engine is \$29,864 in year one and \$20,364 after. The coordinator keeps the judgment calls with the AHJ and the utility; the system takes the status calls and the chasing.

WHATEVER THE INDUSTRY

The work that stops being yours.

Not features. Tasks — the ones currently done by you, done badly by someone else, or not done at all.

Every new lead

- Answered within seconds by text and email, day or night
- Assigned to the right person automatically
- Every missed call texted back
- The quiet ones chased on a schedule that doesn't annoy them
- The appointment booked without a phone-tag loop

Your existing list

- Old leads re-activated after being written off
- Anyone who re-engages detected and routed to a human
- A long-term nurture running in the background
- Unsubscribes and bounces handled automatically
- The list kept clean and deliverable

Clients in progress

- Onboarding sequence and document collection
- Status updates so nobody has to ask
- Invoices and payment links
- Review requests at the right moment
- Referral asks after a win

Partners and referral sources

- Tagged links so every referral is credited automatically
- Printable materials for their counter or desk
- Monthly statements sent without you touching them
- Recruitment outreach to bring on more partners

YOU, ON MONDAY MORNING

One email with the numbers that matter: what came in and from where, what closed, what stalled, how the campaigns did, which partners sent business, and what got built or fixed that week. Plus a dashboard you can open on your phone. Written for an owner, not a technician.