

Lead Management System

Energy, Power & Renewables

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Builds a lead management system for an energy or solar business — capture, qualification, site survey, proposal, negotiation and close — with qualification criteria (roof or load, intent, budget) and a follow-up cadence. Use this to convert enquiries into projects. For generating those enquiries use the Marketing Plan.

Purpose of this tool & output

Convert energy enquiries to projects

How the output is used

Use it to convert enquiries into projects — a lead pipeline, stages, follow-up cadence and the fields to capture.

Important cautions

AI-generated system; adapt to your sales process.

Companion documents

- Energy Solution Sales Proposal
- Customer Education Kit
- Customer Financing Options Guide
- Energy Business Marketing Plan
- Energy Social Content Planner
- Referral Program Designer

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.