



## Introduction

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### **What is a Dealer Performance Score?**

**A score based on how each dealer handles leads that come from SunPower**

- Activities being measured
  - Dealer Tier
  - 45 minutes (or less) contact to call service level agreement (SLA)
    - This is from 9am to 7pm Monday-Friday (local time)
    - Leads arriving after 7pm during the week should be contacted by 9:45am the next business day. A lead that comes in at 6:45pm, should be contacted by 9:30 am the next business day. Leads that arrive on a weekend must be contacted by 9:45 am Monday morning to be within the Service Level Agreement
  - Dealer Portal Timely Updates
  - Closing Ratios

### **Why is the Dealer Performance Score program in place?**

**To partner with dealers that want to partner with us**

- We want to reward dealers with more quality leads who are willing and able to take advantage of the increasing number of leads we are sending your way

**To get you more/better quality leads**

- Give receive feedback via the Dealer Portal
  - A better understanding of each lead source
  - Weeding out of poor lead sources that
    - Don't turn into an appointment
    - Don't turn into a contract
    - Don't turn into a sale
  - Increased energy towards better lead sources
    - Those that get appointments and ultimately close at a higher rate

### **What is in it for you?**

**Leads!**

### **What do you need to do?**

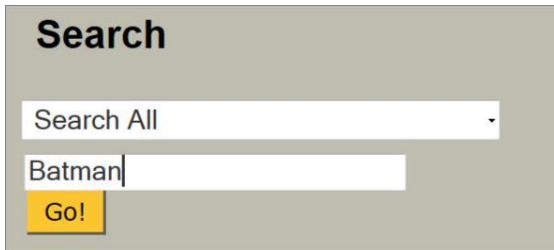
- Adhere to the 45 minute (or less) SLA and log in the dealer portal
- Update the dealer portal as a lead moves through the process
- Improve your closing ratios
- Graduate up the SunPower tier structure

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## The Process

### How to comply with the 45 Minute Service Level Agreement

1. Call the lead as soon as you receive it from SunPower. (Leads must be called within 45 minutes of receipt.)
2. Click on the opportunity link in the email SunPower sends you (this will take you directly to the opportunity page in the dealer portal), or log into the dealer portal and search for the homeowner's name in opportunities.



**Search**

Search All

3. In the opportunity detail section, click edit



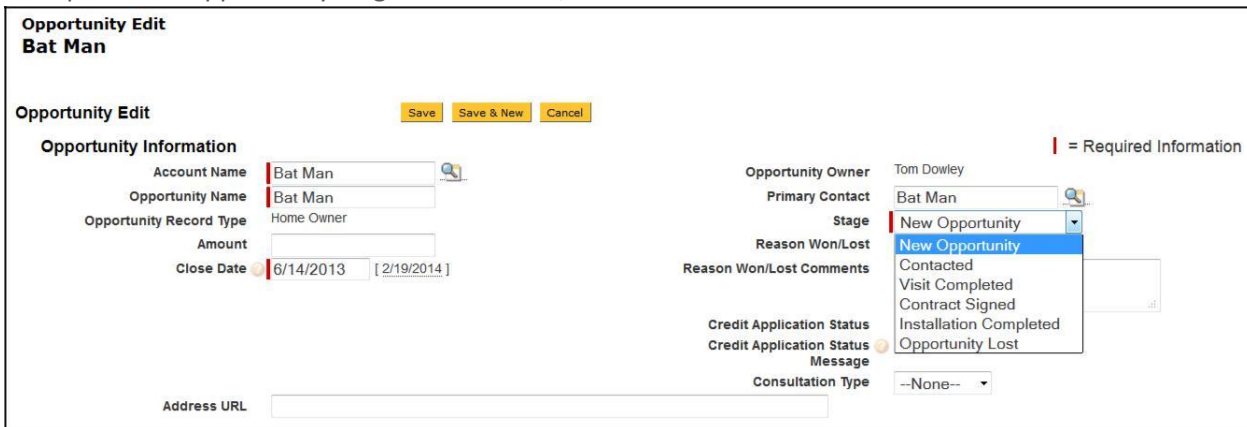
**Opportunity**  
**Bat Man**

[« Back to List: Opportunities](#)

**Opportunity Detail**

Account Name	Bat Man
Opportunity Name	Bat Man
Opportunity Record Type	Home Owner <a href="#">[Change]</a>
Amount	
Close Date	6/14/2013

4. Update the opportunity stage to contacted, and then click save



**Opportunity Edit**  
**Bat Man**

**Opportunity Information**

Account Name	Bat Man
Opportunity Name	Bat Man
Opportunity Record Type	Home Owner
Amount	
Close Date	6/14/2013 [ 2/19/2014 ]

Address URL

**Opportunity Owner** Tom Dowley

**Primary Contact** Bat Man

**Stage**

**Reason Won/Lost**

**Reason Won/Lost Comments**

**Credit Application Status**

**Credit Application Status Message**

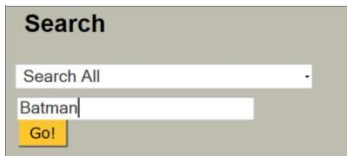
**Consultation Type** --None--

**Legend:** | = Required Information

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## How to comply with the Dealer Portal Timely Updates

1. Log into the dealer portal and search for the homeowner's name in opportunities



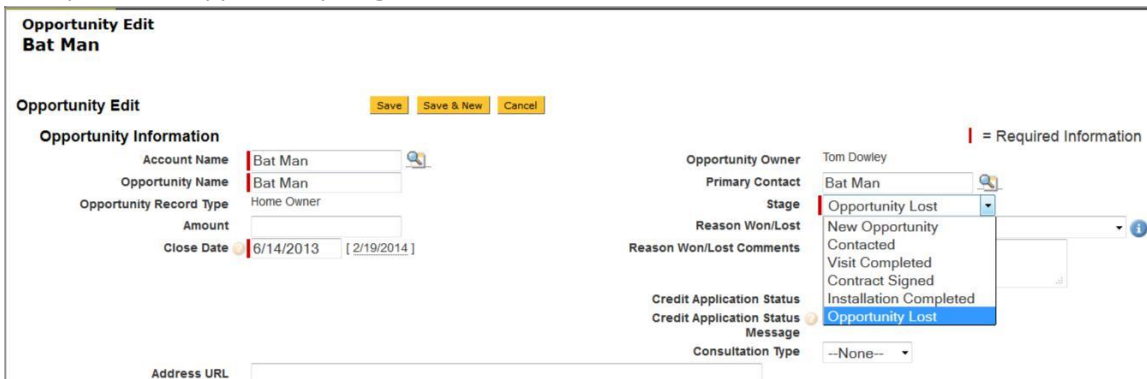
A search form titled "Search". It contains a dropdown menu labeled "Search All", a text input field containing "Batman", and a yellow "Go!" button.

2. In the opportunity detail section, click edit,



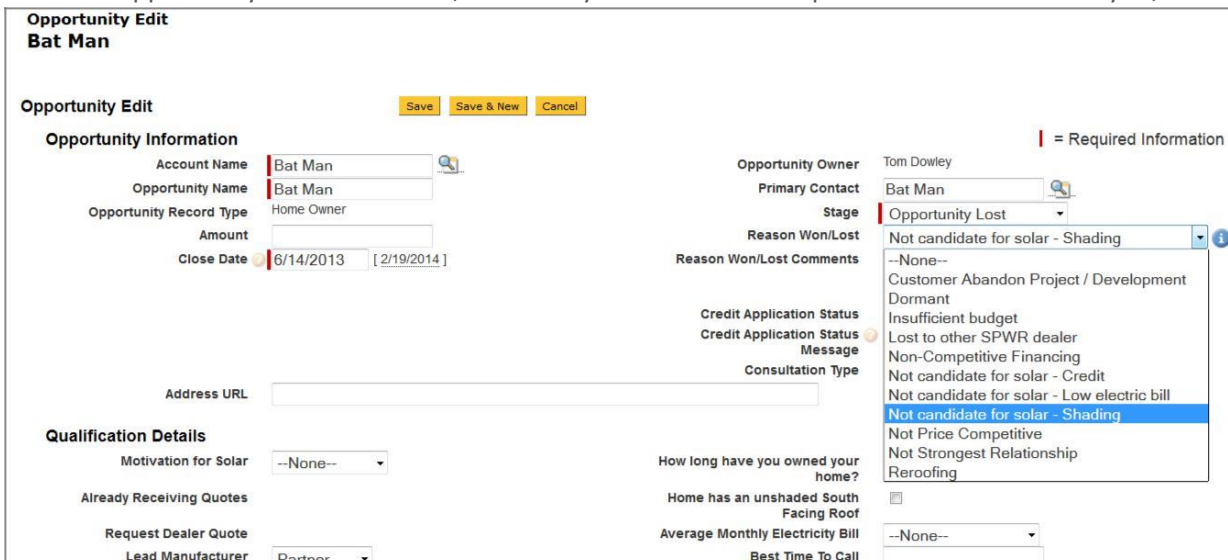
The "Opportunity Detail" section for "Bat Man". It includes a "Back to List: Opportunities" link, an "Edit" button, and fields for Account Name (Bat Man), Opportunity Name (Bat Man), Opportunity Record Type (Home Owner [Change]), Amount, and Close Date (6/14/2013).

3. Update the opportunity stage



The "Opportunity Edit" form for "Bat Man". It includes "Save", "Save & New", and "Cancel" buttons. The "Opportunity Information" section contains fields for Account Name, Opportunity Name, Opportunity Record Type, Amount, and Close Date. The "Reason Won/Lost" dropdown menu is open, showing options like "Opportunity Lost", "New Opportunity", "Contacted", "Visit Completed", "Contract Signed", "Installation Completed", and "Opportunity Lost".

4. If the opportunity was won or lost, tell us why so that we can improve the leads we send you, then click save.



The "Opportunity Edit" form for "Bat Man" with the "Reason Won/Lost" dropdown menu open. The dropdown menu shows a list of reasons for losing an opportunity, including "Not candidate for solar - Shading", "Not Price Competitive", "Not Strongest Relationship", and "Reroofing". The "Save" button is highlighted.



## Best Practices

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1. Make sure there is always someone designated to handle incoming leads
2. Call consumers back quickly!
3. Log them in the Dealer Portal
4. Make updates to your leads as they move through the process
5. Attend Advanced Residential Selling – Close more!
6. Ascend through the SunPower dealer tiers