BUSINESS AUTOMATION FOR SOLAR

A signed contract is not a sale. Get it to PTO.

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Every disclosure goes out before the signature. Every homeowner hears from you at each milestone between the kitchen table and PTO. Every unsold proposal gets worked again, without a rep having to remember.

THE SIGNED-TO-PTO ENGINE · INCLUDED IN GROWTH

Disclosure-First Contract Gate
The deal cannot move to Signed until the required documents check in, and the state's rules are configured per market.

Cancel-Window Welcome Sequence
A calm "what happens next" sequence runs during the right-to-cancel window: who will call, what the site survey is, and what the homeowner needs to do. Any cancellation goes straight to the owner, the same hour.

Lender and TPO Verification Prep
When the finance partner or lease/PPA provider runs its welcome or verification call, the homeowner is reminded ahead of time that the call is coming and why.

Signed-to-PTO Milestone Broadcast
Site survey scheduled, survey done, design approved, permit submitted, permit approved, install scheduled, installed, inspection passed, interconnection submitted, PTO granted.

The Stall Board
A daily list of every signed deal sorted by days in its current stage.

A NEW LEAD'S FIRST HOUR, AFTER THE BUILD

0:00	Lead submits a form, landing page or QR card — lands in the pipeline, tagged by source
0:01	Instant text and email go out under your brand
0:01	Round-robin assigns the next person and notifies them
0:15	Nobody called? Reminder fires, and the owner sees it Monday
Day 1–5	No reply? A short follow-up drip runs, then stops
Sold	Onboarding kicks off on its own, and The Signed-to-PTO Engine takes over

Also in the engine
Rep Deal Board; Unsold-Proposal Rehash Lane; Finance Turn-Down Lane; PTO Referral and Base Program; The Compliance Wall.

PACKAGES · ONE-TIME BUILD, THEN FLAT MONTHLY WITH THE PLATFORM INCLUDED, MONTH TO MONTH AFTER 90 DAYS

Launch
$3,500
then $697 / month

- Tracked number, domain and email
- Pipelines in your team's language
- Lead capture with written consent
- Reply in under 60 seconds
- Round-robin with a claim window
- Missed-call text-back

Growth
$6,500
then $1,197 / month

- **Everything in Launch, plus**
- Branded email templates
- Client onboarding
- Invoicing and payment links
- Document and signature chase
- **The Signed-to-PTO Engine**

Full Engine
$9,500
then $1,697 / month

- **Everything in Growth, plus**
- Referral partner program
- Printable partner materials
- Monthly partner statements
- Partner outreach campaign
- Monthly think-tank: custom automations for your team's daily tasks

A solar project coordinator runs about $75,000 a year loaded
Every signed deal already cost $3,000 to $7,000 to win, before a panel goes on the roof. A deal that cancels in the gap between signature and PTO throws that money away. A project coordinator who chases permits and returns homeowner status calls runs about $60,000 in salary, roughly $75,000 loaded. **Built and running today:** Snap Credit Fix, a California credit repair company, runs on a system I built for them. It answers leads in under a minute, runs a dealer referral program with QR counter cards and automated monthly statements, and sends a Monday report the president reads first.

NEXT STEP

Book a 20-minute build call.

Email everbornproductions@gmail.com or call (916) 541-3415 with your business name and website. You'll get a one-page brief and a fixed quote within two business days.

Same three prices in every industry, quoted for one location and up to five reps; larger teams are scoped in the brief. Platform included; ad spend and carrier fees billed at cost. Own your platform account already? Take $197 off each monthly. Regulated industries get a compliance review in week one at no charge. Independent builder and platform licensee. Results vary.