# Solar Businesses: Choosing the Right CRM for Growth

A comprehensive guide

insightly

# Contents

Solar companies are unique entities and the importance of customer relationship management (CRM) to building a successful solar business cannot be overstated. Insightly has built strong relationships with solar companies, and we've had the privilege of working with some of the most innovative and forward-thinking companies in the industry. Through those relationships, we have gained valuable insight into the challenges and opportunities facing solar companies today.

Our solar customers have made Insightly their CRM vendor of choice because it empowers them to

- Manage the entire customer journey across marketing, sales, project and installation management, and ongoing customer support

- Unify all customer data for more powerful insights

- Integrate all the applications they use to run their business

- Deliver great experiences to their customers in every single interaction

I built Insightly because I didn't see anything like it in the market. We're a modern, flexible CRM that delivers on the unique customization requirements that solar companies like yours need, at a very attractive price.  Have a look at this eBook to learn more about how my team can help you grow your business – I think you'll like what you see.

Sincerely,

*Anthony*

Anthony Smith

"We tripled revenue without tripling the size of our team. As a growing company, we cut down our timelines and I attribute a lot of that to Insightly and setting a foundation for operational efficiency, clean handoffs, and scalability."

**Joanna Falcone**

VP of System and Process Development
Better Earth Solar

WATCH THE VIDEO

# Introduction

Running a successful solar business often boils down to the problem of detail and scale. As the business grows, the amount of data that needs to be tracked multiplies exponentially, and this data must be monitored across multiple field offices and remote teams that may be located in different states or even different countries.

Solar companies need a robust CRM that can track a multitude of data points that range from sales leads and customer information to project status and billing details. This system must be able to scale quickly as the business expands, laying a systemic foundation that will take the business to the next level.

Additionally, the CRM has to be accessible across field offices and remote teams. It should allow all team members to access real-time data, communicate effectively, and collaborate on projects, regardless of their location. This will ensure that everyone is working together toward the same goals, and that the business can operate smoothly and efficiently.

Solar companies need a CRM that is built to handle the complexity and scale of their business. By having a system that can process and analyze data quickly, solar companies can stay ahead of the curve, identify potential issues before they become problems, and scale their business with confidence.

"Insightly has significantly improved our project management operations. Our team currently handles more than 10x the number of projects as we did before adopting Insightly, something that would have been impossible without it. The customizable dashboards and list views provide a high-level snapshot of all of our projects, making it easy to keep track of everything and ensure nothing slips through the cracks."

Joe Kent

Vice President
Renewable Energy Services, Inc.

# Sales Velocity

Solar companies must be able to move leads through their sales pipeline quickly and efficiently, without sacrificing quality or customer experience. Insightly is built to help solar companies establish an efficient sales process, enabling them to stay ahead in a crowded and competitive market.

**How Insightly benefits your business**

- Customizable pipelines to support all your workflows

- Relationship linking to keep track of every interaction

- Lead routing to organize and streamline the sales process

- Timelines, activities, and tasks to keep everyone on track
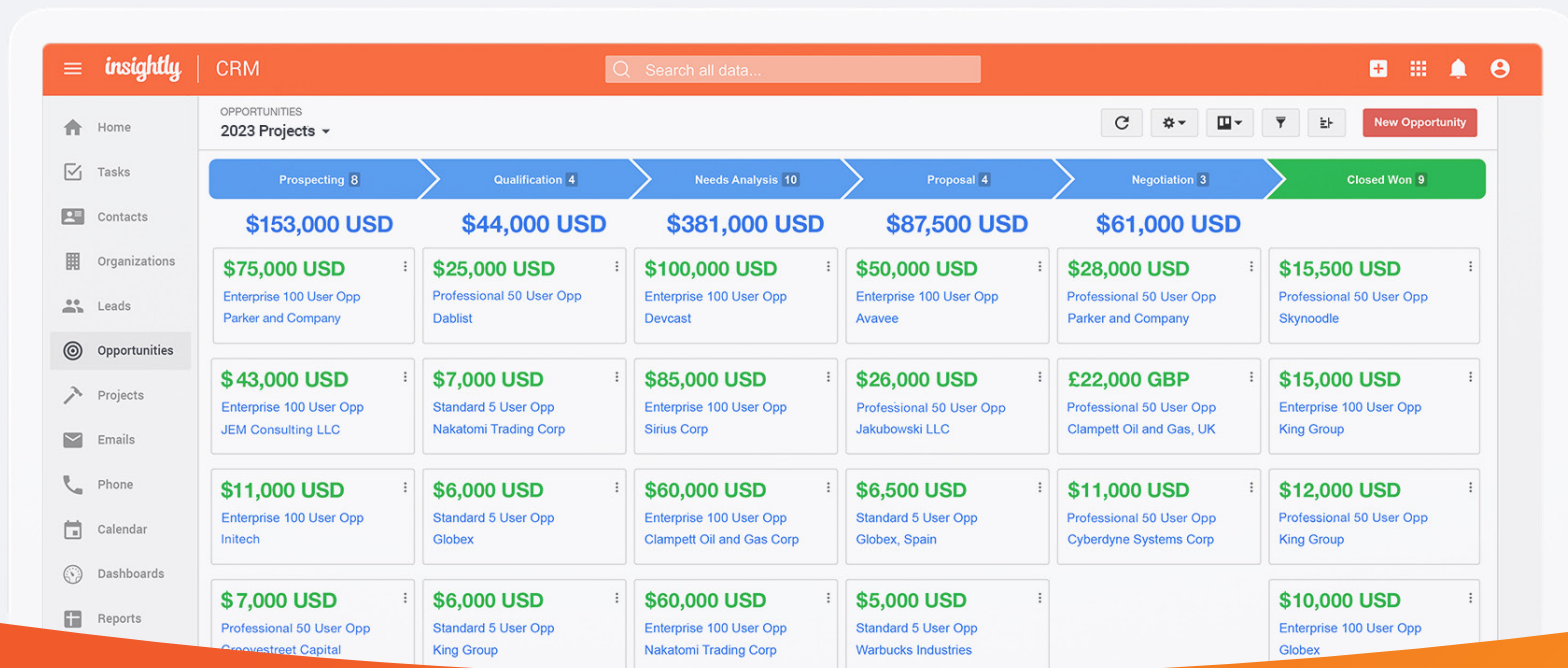
# Project Execution Excellence

Solar installation processes are incredibly complex, involving multiple steps that must be managed perfectly to ensure success. Approvals are a critical part of this process, and failing to get the necessary approvals can cause delays and potentially lead to project failure. This is where Insightly comes in as an important partner to solar companies. Insightly helps you manage approvals and feedback, ensuring that all team members are aware of the current status of the project and any issues that may arise. Additionally, Insightly facilitates clear handoffs between team members, ensuring that installations move smoothly from one stage to the next.

**How Insightly benefits your business**

- Convert opportunities directly to projects with the click of a button

- Convenient pipeline interface creates easy transition between sales and project teams

- Full customization across your business: approvals, products, relationships, inspections, site surveys

- Automation to notify and empower teams to move to the next phase of a project

- Reduce manual error with calculated fields for wattage and other solar-specific measurements

- Reveal mission-critical data to each team and maximize their productivity with dynamic page layouts
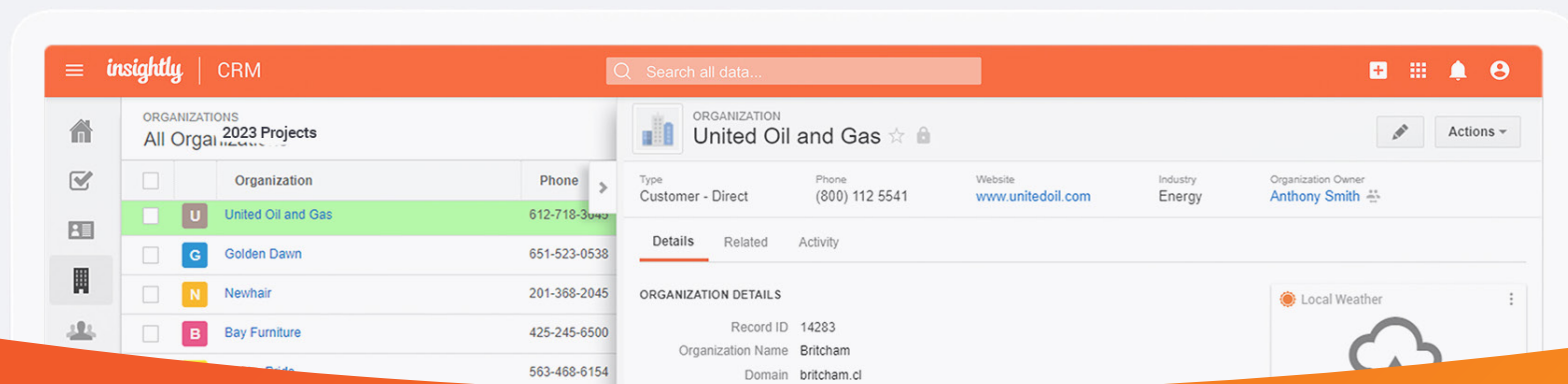
"We were able to shave 50% off of data acquisition timelines for our inspections milestone. Like I mentioned before, we were able to capture data from our field teams by integrating a web form to a custom object. In this example, we utilized an inspections custom object to track the results of our municipal inspections needed to get approval to turn on the solar systems we install. Previously, we were relying on our managers to review the results of the inspection and then mark accordingly in the corresponding project — pass or fail — with what still needs to be done. This allows us to move onto the next step in the project the instant the form is submitted, even from the field."

Joanna Falcone
VP of System and Process Development
Better Earth Solar

# Mobile Capabilities

With many people working in the field, solar companies need a CRM that is accessible from anywhere and allows team members to manage projects, conduct site surveys, collect customer documents, and take action on the implementation process. The ability to automatically move projects to the next step in the process is also crucial, ensuring that no time is wasted and that projects are completed as efficiently as possible. Insightly's mobile application empowers solar companies to stay connected and productive, even when working across multiple geographic locations and in the field.

**How Insightly benefits your business**

- Move through project phases quickly and easily by capturing data from the field with webforms and pushing into custom objects

- User-friendly mobile interface makes it easy for field teams to input data directly

- Better visibility and velocity for management teams with real-time alerts for approvals and updates
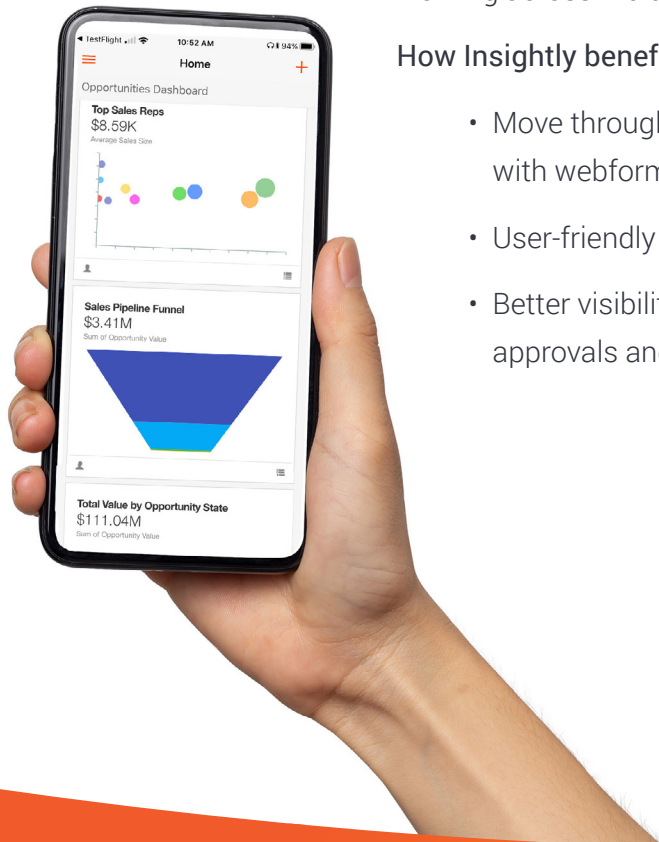
"Given the fact that we doubled our sales, but tripled our installs also speaks to the amount of backlog that we were able to deliver on, which from an operation standpoint is really impactful. As a growing company, we cut down our timelines and I attribute a lot of that to Insightly and setting a foundation for that operational efficiency with clean handoffs and scalability, being able to grow our team. I think eating through the backlog also speaks a lot to the impact Insightly has had on us."

Joanna Falcone

VP of System and Process Development
Better Earth Solar

# Metrics that Matter Most

Insightly offers advanced reporting features that deliver real-time data on solar companies' sales, marketing, and support activities, allowing them to track progress against goals, identify areas for improvement, and make data-driven decisions. With key data available through customizable dashboards, solar companies can identify trends, optimize their operations, and make informed decisions. Insightly delivers reporting and dashboard capabilities that are essential for solar companies to maximize their efficiency, improve their performance, and grow.

How Insightly benefits your business

- Customize around your unique KPIs so that your key metrics are visible at a glance

- Make decisions based on what's happening with your business in real-time

- Get to a single source of truth for your business, save time on handoffs across teams, and create consistency

- Create hundreds of shareable dashboard cards based on your business metrics

"Having a single version of the truth from a data perspective drives that frictionless model that we wanted. It's given us really clear insight on a live basis on how the business is doing. We're looking at easily doubling year on year and Insightly allows us to do that."

Kevin Corne
COO
Sullivan & Stanley

# Efficiency Through Integration

For solar companies, using a low-code, no-code integration engine to connect their CRM to other applications they use to run their business can be incredibly beneficial. Insightly offers AppConnect for just this approach. This eliminates the need for extensive coding or technical expertise, allowing companies to quickly and easily integrate their systems without the need for expensive development resources. By connecting their CRM to other applications such as project management tools, accounting software, or marketing automation platforms, solar companies can streamline their operations and improve their efficiency. They can also gain better visibility into their customer data, allowing them to make more informed decisions and deliver a more personalized customer experience. In addition, using a low-code, no-code integration engine can save solar companies time and money, as it empowers them to rapidly deploy new integrations and adapt to changes in their business needs.

How Insightly benefits your business

- Automate the processes that matter to your business: sales, marketing, HR, product, finance, IT, support, and product are all supported

- Your non-technical teams are empowered to create integrations with AppConnect's low-code/no-code integration capability

- Assign tasks, secure approvals, keep track of compliance requirements and more

- Real-time data sync and process automation delivers seamless project visibility and reduces errors

"Ideas are great, but implementation makes you money. We've grown 242% since implementing Insightly."

Miles Reynolds
President
Las Vegas, Sport Court

# A Modern Platform

Insightly is a powerful tool for solar companies because it's built on a single, modern platform. This creates visibility across the customer journey for your sales, marketing, and support teams. A single, comprehensive view of the customer helps your sales teams tailor their approach and provide personalized service to customers, while your marketing teams can use it to create targeted campaigns and messaging that resonates with their audience. Support teams can also benefit from Insightly's modern platform because it helps them to track customer issues and ensure that they are resolved quickly and efficiently. With Insightly, solar companies can break down silos between teams and create a unified approach to serving customers, improving communication, and maximizing efficiency across the organization.
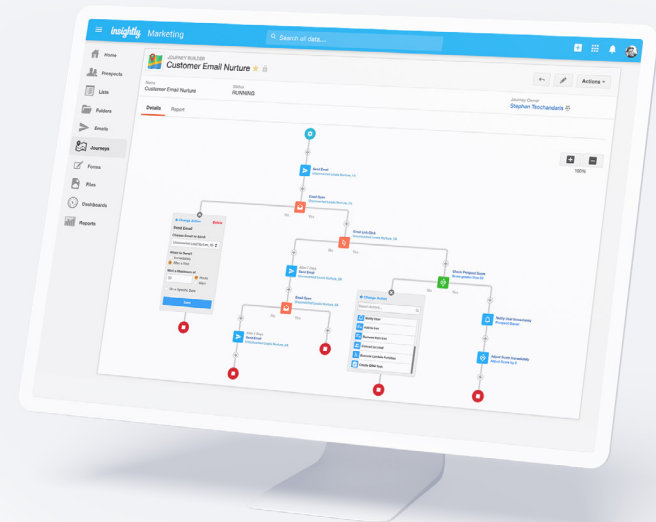
# A Modern Platform

**How Insightly benefits your business**

- Sales and marketing data are aligned to drive more velocity through the pipeline and close more deals faster

- All teams have access to information across sales, marketing, and support for a full view of the customer

- Reduce your expense and time-to-value with a single, modern data platform, instead of using multiple legacy systems for different teams

- Capture a single source of truth for your business across teams

- Your business is supported with a robust feature set, and a scalable, affordable, easy-to-adopt platform

# About Insightly

Insightly is the modern, affordable CRM that teams love. It's easy to use, simple to customize, and scales with companies as they grow, solving common pain points that legacy CRMs can't. Powerful in any vertical, Insightly CRM customers can add companion products for marketing automation, customer service, and integrations in the same platform. Insightly is trusted by more than a million users worldwide. For more information, visit insightly.com.
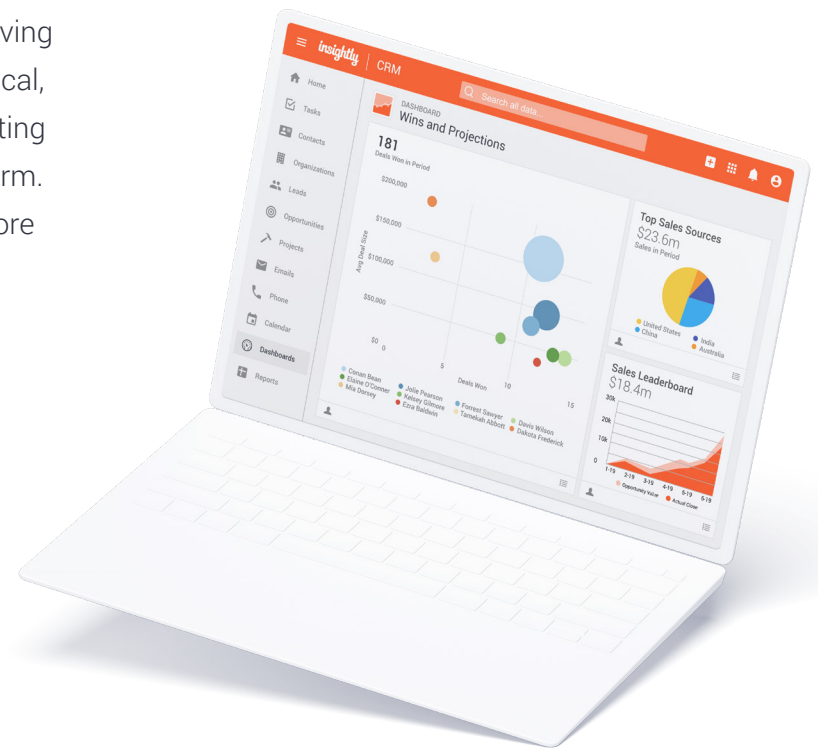
## Insightly CRM

Centralize your customer data and close more deals

## Insightly Marketing

Create engaging customer journeys and grow pipeline with the power of marketing automation.

## Insightly Service

Elevate your support and exceed customer expectations with a full-function customer service ticketing application.

## AppConnect

Stay connected to the apps you already use with a no-code/low-code integration platform.

## See Insightly in action.

REQUEST A DEMO    START A FREE TRIAL

**insightly**

The modern, affordable CRM teams love.