PIF Process: A lead to a proposal

Everything starts with a PIF (prospect information form) and bills. We are not able to move forward with any lead (LED or renewable) until we have a complete PIF and a full set of bills.

General rules of thumb:

- Please send all PIFs and bills to leads@verdesolutions.com
- If there are multiple locations you'd like us to analyze, we need a PIF and bills for each location.
- The more information on the PIF the better.
- Digital versions of the PIF are preferred.

Bill general rules of thumb:

- LED - we need 1-month electricity bill (most recent preferred)
- Solar - we need 12 months of electricity bills (most recent preferred)
- CHP- we need 12 months of both electricity and natural gas bills (most recent preferred) and if possible mechanical/electrical drawings and/or schedules
- Attached you will find supporting material to help identify solar and CHP opportunities

PIF Process

1. PIF and bills are sent to leads@verdesolutions.com
2. Sales Support team member will review for completeness
    1. If PIF is not complete or we do not have enough bills, it will be returned to be resubmitted by the agent.
3. Once a PIF is verified as complete, Sales Support will assign the lead to a Corporate Sales Rep.
4. The Corp. Sales Rep. will contact the prospective client within 24 hours of receiving the lead from Sales Support to qualify the lead, confirm contact information, and service interest.

If LED:

1. An on-site lighting audit is conducted within 2 weeks of the Corp. Sales Rep.'s qualification. This two-week window is for the client's convenience.
2. Within 1 week of receiving the audit data, the Sales Support team will analyze the data and create a custom proposal including a rebate analysis.
3. The Corp. Sales Rep. that is assigned to this lead will review the proposal and send to the agent to discuss and assist in presenting to the client.

If Solar or CHP:

1. The Sales Support Engineering team will analyze the information provided by the PIF and bills and develop a custom proposal within 1 week of receiving confirmation that the lead is qualified.
2. The Corp. Sales Rep. that is assigned to this lead will review the proposal and send to the agent to discuss and assist in presenting to the client.