

SR

Sales Pipeline

SunRidge Solar · residential · 47 open deals · avg cycle 74 days

● AI scoring + follow-up on

OPEN DEALS

47

\$1.31M pipeline value

AVG TIME TO CLOSE

74 days

Jan–Jun average

STALLED > 14 DAYS

9

flagged for a call today

SIGNED THIS MONTH

\$312K

11 deals · 8 to install

Deals needing attention today

aging surfaced first

88

SCORE

D. & K. Alvarez · Collierville

\$390/mo bill, south roof, no shade. Proposal opened 3x, no reply. Said they were waiting on a tax refund.

Proposal sent

18 days quiet

Stalled

Rep call queued

71

SCORE

R. Whitfield · Germantown

Approved for financing, contract not signed. Spouse hadn't seen the design — AI sent the shareable version.

Financing

11 days quiet

Nudge sent

At risk

Auto follow-up

92

SCORE

New lead · T. Osei · Bartlett

\$425/mo bill, owns, replied to first text in 4 min. Top-scoring lead in the queue — route to a rep now.

New lead

Call first

Assigned

Marcus · today

64

SCORE

L. Park · Cordova

Site assessment done, likes the numbers, wants one more winter of bills first. A real "not yet," not a no.

Assessment done

Long-cycle drip

Nurturing

Check-in Sep

38

SCORE

Web form · J. Reyes · Midtown

Renter, low bill, curious about a duplex. Auto-nurtured in the background — not worth a rep's best hour.

Qualifying

Auto only

Keep warm

No rep time

Pipeline by stage

conversion between stages

Qualified

140

64% booked an assessment

Site assessment

90

81% got a proposal

Proposal sent

73

only 55% reply — the leak

Financing

40

28% stall here

Signed

29

21% of qualified → signed

Follow-up cadence · Alvarez

paced for a long sale

- Proposal delivered + walkthrough text Day 0 ✓
- "Any questions?" check-in Day 3 ✓
- Savings recap + financing options Day 9 ✓
- Stalled — handed to rep for a call Day 18 →
- Incentive-deadline reminder queued