The Common Stead

SMART ENERGY SOLUTIONS
LEADING THE ENERGY TRANSITION

Becoming Brilliant at the Basics

SMART ELECTRICITY OPTIMIZERS

Power Optimization and Correction (PO&C)

Becoming Brilliant at the Basics

Smart Electricity Optimizers

Start Here: Understand the Two Types of Clients

Before discussing features, benefits, or technical details, it is critical to understand that there are **two primary types of Smart Optimizer clients**.

Understanding which type of client you are speaking with will help you present the product clearly and effectively.

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1. Commercial Clients

Commercial buildings typically operate with equipment that runs consistently throughout the day. This includes HVAC systems, compressors, pumps, refrigeration systems, elevators, and other inductive motor loads.

For commercial properties, the Smart Optimizer performs three(3) essential electrical functions:

• Filters Harmonic Distortion

• Provides Power Factor Correction on motors and equipment the building operates continuously.

• Surge protection for equipment tied to point of installation

When harmonic distortion is filtered and power factor is corrected, the building benefits in several important ways:

• Energy savings of up to 30%

• Reduced wasted electricity

• Extended operational lifespan of motors and equipment

• Reduced electrical stress on building infrastructure

• Improved overall electrical efficiency

In summary, the Smart Optimizer is not simply an energy-saving device. It is also a tool for protecting electrical infrastructure, improving system stability, and reducing long-term equipment maintenance costs**.**

Scripts: Commercial Call Openers

Commercial Call Opening Scripts

2. Homeowners

The second type of client is the **residential homeowner**.

For residential applications, the Smart Energy Optimizer is installed at the main electrical panel, where it filters Total Harmonic Distortion (THD) throughout the home's electrical system.

By reducing harmonic distortion at the panel level, the Smart Energy Optimizer helps improve the electrical efficiency of the entire home.

Key benefits include:

- Energy savings of up to 15% on electricity consumption
- Improved electrical efficiency across the household
- Reduced electrical waste
- Whole-home surge protection
- Protection for sensitive electronics and appliances

Because household energy usage fluctuates seasonally (heating, cooling, appliances, etc.), these savings are best understood as being aggregated over a 12-month period.

Smart Optimizer (RESIDENTIAL) - General Layman's Explanation of Total Harmonic Distortion.pdf found HERE:
https://docs.google.com/document/d/1m9mbB0aYQS81VaD_DbhJPcrcuIDbCY82/edit?usp=sharing&ouid=105094774413237471276&rtpof=true&sd=true

Sales Rep Training (Technical info and What is needed to present solutions)
https://docs.google.com/document/d/15loarS0SX6o1GIEDWbBHdcJkORsqbT63/edit?usp=sharing&ouid=105094774413237471276&rtpof=true&sd=true

Simple Residential Optimizer Script:
https://docs.google.com/document/d/1NQOLUy1Si71UwWRXWKef-EqraMWTOyah/edit?usp=sharing&ouid=105094774413237471276&rtpof=true&sd=true

Key Training Takeaway

At the most basic level, your first step is identifying which type of client you're working with.

Commercial Client

- Harmonic distortion filtering
- Power factor correction
- Up to 30% energy savings
- Equipment longevity
- Whole-building surge protection

Homeowner (Residential)

- Total harmonic distortion filtering at the main panel
- Up to 15% annual energy savings
- Whole-home surge protection

Once you clearly identify the client type, you can confidently present the Smart Optimizer with the correct benefits and expectations for that application.

SECTION 1 : Power Optimization and Correction

Welcome

Welcome to the world of **Power Optimization and Correction (PO&C)**. Any household or business that uses electricity is a potential customer. Hop in, buckle up, and get ready to open doors for the energy conversation.

Why This Product Matters

PO&C matters because the price of energy will never go down, and demand for electricity is growing at an exponential pace. This is creating a lot of uncertainty around electricity. Every household and business needs technology that cuts consumption and moves them closer to energy independence.

What Problem It Solves

Electricity travels in waves. Over distance, those waves fragment and spike. That's called ***Total Harmonic Distortion*** **(THD)**. Those spikes make the electricity "dirty." When electricity is dirty, the devices on your microgrid have to work harder to sort out the distortion, which means higher consumption. It's simple: clean electricity means your devices run more efficiently and use less power. That's what PO&C does: it optimizes and corrects your electricity.

The second problem the optimizer solves is surge protection. Grid instability means every household and business is exposed to surges that can damage or destroy the electrical devices on the building's microgrid. One lightning strike or power surge can wipe out everything. The optimizers provide surge protection, so your equipment is protected and you've got peace of mind.

Who This Helps

Simply put: every household and business that uses electricity. That said, the optimizers really shine in environments with motors or inductive loads. In residential this includes:

1. AC units
2. Pool pumps
3. Hot tubs
4. Heat pumps
5. Refrigerators
6. Freezers
7. Compressors
8. Well pumps (if they have a well)

In commercial applications, the list is similar:

1. AC units
2. Heat pumps
3. Refrigerators
4. Freezers
5. Compressors
6. Motors of any kind
7. Well pumps (if they have a well)

How to Use This Playbook

This playbook is practical. You don't need to read it all at once or memorize anything. Use it as a reference as you learn and start having conversations.

How It's Organized

Sections flow from understanding the product, to explaining it, to using it in conversations.

Sections 2 & 3 break down each product:

- What it is
- How it works (in plain English)
- The core science behind it

Section 7 contains documented results:

- Case studies
- Before & after examples
- Measurable outcomes

Section 8 is your action section:

- Scripts
- Messaging
- Texts, emails, and social posts
- Conversation starters for outreach

Everything links back to the **Source of Truth Folder,** so you always know where to find the latest assets, photos, and documents.

Residential vs. Commercial

Throughout this playbook, **Residential** and **Commercial** are clearly separated where it matters.

- **Residential** sections cover homeowners, energy savings, and simple in-home conversations.
- **Commercial** sections cover facilities, power quality, equipment protection, and professional outreach.

Skip what doesn't apply and go straight to the strategies that fit your market.

Getting the Most Out of This Playbook

- Start with the Product Basics and Educational sections to build confidence. Use **Section 8** when you're ready to start reaching out.
- Save images, testimonials, and examples to your phone so you can show, not tell.
- Come back to this playbook often. It's here to support you as you grow, not to pressure you to "get it all" right away.

The goal is simple: **Becoming Brilliant at the Basics**, one conversation at a time.

SECTION 2: Product Basics

What It Is

The optimizer attaches to your electrical panel and performs **Power Optimization & Correction (PO&C)**. In commercial applications, optimizers are installed at the control panel and as close as possible to motors and circuits for maximum impact.

How It Works

Inside the optimizer, capacitors and circuits filter out **Total Harmonic Distortion (THD)**, the electrical interference that makes your power "dirty." Think of it as an electrical filter that runs in the background, cleaning your power so every device on your system runs more efficiently.

Key Features

- 10-year warranty
- 25-year life expectancy
- UL listed & Canadian CUL certified
- Self-healing capacitors
- Commercial & Residential options
- Manufactured in the US

What Makes It Unique

The optimizer is the only solution on the market that combines THD elimination and surge protection in one device. In commercial applications, it also corrects power factor, making it a complete power quality solution.

Product One-Liner

Optimizers clean your electricity, optimize your systems' performance, and protect your equipment from electrical surges. Clean electricity means your devices use less power and last longer.

Why Now?

This technology has been used at the utility level since 2000 and in commercial applications since 2005. Thanks to breakthroughs in miniaturization, performance, and capacitor design, optimizers are now accessible and affordable for homes and businesses with a strong, measurable return on investment.

SECTION 3 : How to Explain It

Smart Optimizer (RESIDENTIAL) - General Layman's Explanation of Total Harmonic Distortion.pdf found HERE:
https://docs.google.com/document/d/1m9mbB0aYQS81VaD_DbhJPcrcuIDbCY82/edit?usp=sharing&ouid=105094774413237471276&rtpof=true&sd=true

Sales Rep Training (Technical info and What is needed to present solutions)
https://docs.google.com/document/d/15loarS0SX6o1GIEDWbBHdcJkORsqbT63/edit?usp=sharing&ouid=105094774413237471276&rtpof=true&sd=true

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SECTION 4a : Residential Benefits & Pain Points

Benefits

- Electricity savings for the life of the product
- Surge protection

Pain Points This Fixes

- Rising electricity costs for every household
- Solar homeowners still paying power bills because they didn't get a full offset
- Risk of electrical device damage from power surges

Emotional Pain Points

- Electricity bills that keep climbing with no end in sight
- Risk of electrical device damage from power surges

Logical Pain Points

- Uses less electricity
- Maintenance-free. Install it and forget it.
- 10-year warranty
- 25-year life expectancy

SECTION 4b: Commercial Benefits & Pain Points

Benefits

- Electricity savings for the life of the product
- Surge protection

Pain Points This Fixes

- Rising electricity costs for every property
- Demand, peak usage, and time of use charges
- Replacement costs of existing equipment (ie Pumps, A/C, Refrigeration)
- Risk of electrical device damage from power surges

Emotional Pain Points

- Electricity bills that keep climbing with no end in sight
- Risk of electrical device damage from power surges
- Equipment failure at inconvenient times

Logical Pain Points

- Uses less electricity

- Maintenance-free. Install it and forget it.
- 10-year warranty
- 25-year life expectancy

SECTION 5 : Where It Works

Ideal Residential Opportunities

Any home with a utility bill over $100. It works in any home, but bills under $100 mean a much longer payback period.

Top 30 Industries for Commercial Smart Electricity Optimizers

Tier 1 – Best Fit, Fastest ROI

1. Manufacturing & Light Industrial Facilities
   High motor loads, Variable Frequency Drives (VFDs), compressed air, demand charges
2. Cold Storage & Refrigerated Warehouses
   Continuous refrigeration, high peak demand, asset sensitivity
3. Data Centers & Server Farms
   Power quality critical, harmonic-heavy loads, uptime sensitivity
4. Large Retail (Big Box & Grocery)
   HVAC, refrigeration, lighting, predictable demand patterns
5. Hospitals & Healthcare Campuses
   Mission-critical power, equipment protection, 24/7 load profiles
6. Distribution & Logistics Warehouses
   HVAC, conveyor motors, forklifts, expanding electrification
7. Food & Beverage Processing Plants
   Pumps, compressors, sanitation loads, constant runtime
8. Commercial Office Towers (Mid–High Rise)
   HVAC-dominated demand, Time-of-Use (TOU) exposure, tenant load variability
9. Water & Wastewater Treatment Facilities
   Large pumps, motors, continuous operation, public-sector ROI
10. Hotels & Resorts
    HVAC, laundry, kitchens, peak-driven utility bills
11. Agricultural Irrigation (Well Pumps & Pivot Systems)
    Large motors, long runtimes, seasonal demand spikes
12. Multi-Site Retail Chains & Franchises
    Portfolio-level savings, repeatable installs
13. Self-Storage Facilities (Climate-Controlled)
    HVAC-heavy, simple infrastructure, fast payback

14. Universities & Large Educational Campuses
    Mixed-use loads, aging infrastructure, sustainability mandates
15. Shopping Malls & Mixed-Use Developments
    High aggregate demand, tenant variability
16. Food Distribution & Wholesale Facilities
    Refrigeration + logistics = compounding savings
17. Automotive Manufacturing & Parts Plants
    Robotics, welding, compressed air, demand sensitivity
18. Pharmaceutical Manufacturing & Labs
    Power quality critical, asset protection priority
19. Commercial Laundries & Linen Services
    Motors, heating, continuous throughput
20. Mining & Aggregate Operations
    Heavy motors, pumps, conveyors, remote grid exposure
21. EV Charging Infrastructure Operators
    Peak load management, grid constraints, power quality
22. Cannabis Cultivation & Processing Facilities
    Lighting, HVAC, humidity control, high energy density
23. Indoor Agriculture & Vertical Farms
    Controlled environments, constant electrical demand
24. Airports & Transportation Hubs
    HVAC, lighting, security systems, critical uptime
25. Telecommunications Facilities & Cell Sites
    Power stability, electronics protection
26. Municipal Buildings & Government Facilities
    Budget-driven ROI, resilience requirements
27. Entertainment Venues & Stadiums
    Large but intermittent loads, peak demand penalties
28. Ports & Marine Terminals
    Cranes, refrigeration, shore power electrification
29. Senior Living & Assisted Care Facilities
    HVAC-heavy, 24/7 occupancy, reliability focus
30. Commercial Greenhouses
    Lighting, climate control, predictable usage cycles

Why These Industries Win

Smart Electricity Optimizers work best where there's:

- High motor or HVAC concentration
- Non-linear loads (VFDs, electronics)
- Demand charges or TOU pricing
- Asset protection sensitivity
- Potential for repeat installs across multiple locations

Other Commonstead Products That Pair With Optimizers

Why Coat Zone / Coil Safe / ThermalBlock, AquaFlow Valves, and Arctic Blanket Multi Layer Insulation (Radiant Barrier) pair well with Smart Electricity Optimizers, how they stack savings, and how those savings create "anyway money" that can go toward solar and storage. "Anyway money" is money they're already spending, so why not help them keep more of it?

Why These Technologies Work Best Together

The Commonstead Efficiency Stack

One System. Multiple Layers. Better results.

1. Smart Electricity Optimizers

The Control Layer

- Manages power quality, harmonics, voltage, and peak demand
- Cuts electrical waste before it hits your bill
- Protects equipment from unstable power

Outcome:

- 10–25% electricity reduction
- Lower equipment wear
- Immediate cash-flow improvement

This is the foundation. Every other layer works better when power is clean and stable.

2. Coat Zone / CoilSafe / ThermalBlock

The Thermal Efficiency Layer

- Improves heat transfer at the coil
- Cuts fouling, corrosion, and thermal resistance
- Keeps HVAC performance steady over time

Why It Matters:

Clean electricity still gets wasted if heat transfer is inefficient.

Outcome:

- Lower runtime
- Fewer compressor starts
- Extended HVAC life

Optimizers reduce electrical waste.Coatings eliminate mechanical and thermal waste.

3. AquaFlow Valves

The Fluid Optimization Layer

- Controls flow and pressure automatically
- Cuts pump energy and turbulence
- Less mechanical stress on motors

Why It Pairs with Optimizers:

- Pumps use electricity more efficiently
- Lower starting loads
- Less harmonic and surge exposure

Outcome:

- Additional electrical savings
- Improved system reliability
- No behavior change required

A lot of energy loss happens in water systems, not just on the electrical side.

4. Arctic Blanket Multi Layer Insulation (Radiant Barrier)

The Energy Loss Prevention Layer

- Stops heat from escaping or getting in at pipes, tanks, and equipment
- Keeps system temperatures steady
- Boosts efficiency without adding load

Why It Matters:

The cheapest energy is the energy you never lose.

Outcome:

- Fewer cycles
- Lower peak demand
- More durable optimizer savings

If heat isn't leaking out, electricity doesn't have to work harder

Turning Savings Into ‘Anyway Money’

What Is ‘Anyway Money’?

It’s money customers were already spending on electricity, and were going to keep spending anyway.

Optimizers cut the waste, which means:

- Bills go down
- That money is recovered
- No budget increases. Just less waste.

Why This Matters

When electricity is clean and optimized:

- Monthly utility spend drops immediately
- Cash flow improves without anyone changing how they do things
  Savings show up right on the bill

That recovered cash becomes flexible money, money that can go somewhere useful instead of being lost to waste.

SECTION 6 : How Commercial SEO Compares

There are other units on the market. Here's how they stack up.

Feature / Specification	Smart Energy Optimizer	Other Units on the Market
Power Factor Correction	Proprietary design with top-tier self-healing capacitors for Superior performance	Passive correction with limited effectiveness
Surge Protection	5000 joules of built-in protection UL listed	Often sold separately or very small
Harmonic Filtering	Mitigates voltage spikes and electrical noise (Total Harmonic Distortion or THD) using proprietary design	None
Self-healing Capacitors	Yes, metalized, self recovering components.	Typically fixed or non recoverable
Safety Features	UL & CuL listed pressure sensitive Interrupters rated for 10,000A fault current	Varies by manufacturer
Operational Performance	NEMA 3R enclosure indoor outdoor, 0.5 W energy loss minus 40° C to 90° C range	Limited environment range and inconsistent build
Energy Savings (typical)	Up to 30%	Could be less than 5% savings based on not addressing harmonic distortion
Certifications	UL Listed and CUL approved	May lack certification safety or energy testing
Warranty & Lifespan	10 year Warranty, 25- year expected product lifespan	1-3 years warranty 10-year lifespan
Installation Simplicity	Compact 10”x10”x6” box Plug and Play for licensed electricians	Often requires workaround installs or bulkier units
Residential Versions	Residential units available with THD Filters & Surge Protection	No

kVAR vs. Smart Electricity Optimizers

The kVAR model corrected reactive power using fixed or stepped capacitor banks. That worked well for the loads common decades ago, but today's grids run on non-linear loads that require harmonic filtering, voltage optimization, and adaptive controls, capabilities that go beyond what kVAR was designed to do.

Smart Electricity Optimizers are the next step: software-driven, adaptive systems built for today's electronics-heavy environments.

What Changed Since kVAR

1. It Wasn't Built for Harmonics

Modern buildings run on non-linear loads (VFDs, LEDs, servers, EV chargers).
Legacy kVAR systems often:

- Increase harmonic distortion
- Overstress capacitors
- Cause breaker trips

In some cases, they didn't improve power quality.

2. It Was Static in a Dynamic World

kVAR correction assumed steady loads and predictable demand, conditions that don't exist anymore.

Smart Electricity Optimizers:

- Adjust in real time
- Respond to changing loads
- Optimize continuously

3. The Savings Didn’t Last

kVAR savings were based on outdated utility penalties that:

- No longer apply under modern tariffs
- Weren’t the main driver of high bills

As billing shifted to demand and time-of-use, kVAR stopped making financial sense.

Why Smart Electricity Optimizers Work

Optimizers address the *entire* electrical system:

- Harmonic mitigation
- Voltage & load optimization
- Demand reduction
- Surge protection

Result: proven, measurable savings (up to 15% residentially and up to 30% commercially) plus asset protection.

Executive Takeaway

kVAR addressed one variable in a complex system.
Smart Electricity Optimizers deliver adaptive control built for modern power systems.

30-Second Talk Track

“kVAR made sense years ago when buildings were simpler.

Today, everything runs on electronics, VFDs, LEDs, servers, EV chargers.

Those older systems weren't designed for today's loads. They don't address harmonics, and in some environments, that gap can create new issues.

Smart Electricity Optimizers are different. They adjust in real time, clean up power quality, reduce demand, and protect equipment, which is why the savings actually stick.”

Overview

The traditional kVAR correction model focused narrowly on reactive power compensation using fixed or stepped capacitor banks. While suitable decades ago for linear loads, this approach was not designed to address harmonic distortion, modern non-linear loads, and real-time grid dynamics, leading to limited savings and reduced effectiveness in today's electrical environments.

Smart Electricity Optimizers represent the next evolution: software-driven, adaptive systems designed for today's electronics-heavy environments.

SECTION 7: Results

“The Smart Optimizer you installed for us last month dropped my Electricity bill - Can I get one ordered for my mother-in-law?”
Adam M., Bakersfield, CA

“We are installing solar on our home and decided to install an optimizer as a first step. Our electricity consumption dropped 20.9% BEFORE going solar. I tell everyone…”
Devin J. Broomfields, CO

“I must admit the optimizer I purchased had me a bit skeptical but they installed it in 20 minutes and my next month’s bill was significantly less!”
Ashley W., Millcreek, UT

“We live in the lighting capital of the U.S.. What I appreciate the most is the peace of mind. I know my home is protected from power fluctuations, and I’m getting the most efficiency out of every device in the house. Installing the Smart Electricity Optimizer has been one of the best home updates I’ve made. I wish I had done it sooner.”
Connie T., Kissimmee, FL

SECTION 8 : Scripts, Emails, and Outreach

Residential Smart Electricity Optimizers

15-Second Pitch

"Most homes waste electricity in the background. The Optimizer fixes that by lowering bills, protecting appliances, and doing it all automatically."

30-Second Pitch

“Most homes waste electricity without the homeowner realizing it.
A Smart Electricity Optimizer cuts that waste by managing when and how power is used. Homeowners usually see up to 15% lower bills, better protection for appliances, and nothing about how they live has to change. It just runs quietly in the background.”

Commercial Smart Electricity Optimizers Calls

Voice Script

Hi, this is **[Name]** with **The Commonstead**.

I'm reaching out because we help companies reduce monthly utility expenses with simple technology upgrades that can increase **net operating income**. In many cases, we help cut utility costs by **up to 30%**.

I was hoping to find out who on your team oversees the **utility bills for the property or facility**. If that's you, great. If not, I'd appreciate being pointed in the right direction.

You can reach me at **[phone number]**.

Again, this is **[Name]** with **The Commonstead** at **[phone number]**. Thank you.

Cold Call / Conversation Opener

Hi, I'm **[Name]** with **The Commonstead**. Did I catch you at a bad time?

(If they say no)

Great. I wanted to ask if you'd be open to a brief conversation about how our simple utility-saving technologies can help increase your **net operating income**.

What we do is review the monthly utility costs a property is already incurring and identify ways to reduce them — in some cases by **up to 30%**.

Who at your company is responsible for **reviewing or paying those utility bills**?

15-Second Pitch

"Most commercial buildings overpay for electricity because peaks aren't managed.
The Optimizer smooths that out automatically, cuts demand charges, and protects equipment."

30-Second Pitch

"Most buildings overpay for electricity because power use isn't managed during peaks.
A Smart Electricity Optimizer smooths those peaks, improves power quality, and cuts demand charges without disrupting operations. That's why most facilities see up to 30% savings and a fast return."

CFO-Focused Pitch
"Electricity is a major expense most companies don't manage. The Optimizer lowers that spend by cutting demand charges and waste, with measurable savings and a short payback. Low risk. Clear ROI."

Facility Manager Pitch
“Your building reacts to power instead of controlling it.
The Optimizer smooths load swings, improves power quality, and protects equipment, all while your systems keep running. Less stress, fewer issues, lower bills.”

Talking Points

- “It smooths peaks, that’s where the savings come from.”
- “Same building. Smarter power.”
- “No downtime. No behavior change.”
- “It runs quietly in the background.”

Residential Text Prompts

Openers (pick one)
- “Hey random question, do you rent or own where you’re at now?”
- “I forget, you said you guys looked into solar before right?”
- “Geeze, have your electric bills been climbing like everyone else’s? Our rates are insane”

If they say they rent
- “Got it, totally makes sense.”
- “Most renters I talk to feel stuck with bills they can’t control.”
- *(Optional)* “There’s actually something landlords are starting to use that lowers building-wide power waste, happy to share if helpful. Bonus, you can take it with you when your lease is up, unlike solar! ”

Goal: keep rapport, don’t force it.

If they say they own
- “Nice, that’s actually why I asked.”
- “A lot of homeowners don’t realize how much power is wasted behind the scenes.”
- “Have you ever heard of Electricity Optimizers?”

If they've never heard of Optimizers

- "Totally fair, most people haven't."
- "It's not solar. It's a system that cleans up wasted power and smooths spikes. Small device, my friend had hers installed in 20 min"
- "Would you be open to a short call in the near future to answer your question?"

If they looked into solar before

- "That makes sense, a lot of people did. Remind me why you didn't move forward?"
- "This actually works *with* or *without* solar."
- "It focuses on reducing waste, not producing power."
- "Shoot me your bill, maybe this could help bring those bills down"

Commercial Text Campaign

You wouldn't text a commercial lead unless you already know them.

Opener

- "Hey, do you still work at {{Company Name}}?"
  (let them answer)

Follow-up

- "Random question, but who usually handles the electric or water bills over there?"
- "Is that something you're involved in, or someone else?"

If they're not the decision maker

"Would you mind pointing me in the right direction? I just need a name and number. I am looking for a director of facilities or operations… really just the person who handles those bills"

If they are involved

- "The reason I ask is that a lot of buildings overpay due to peak demand and power waste."
- "There are systems now that clean that up automatically without disrupting operations."
- "Have you ever heard of Smart Electricity Optimizers or AquaFlow?"

If they haven't heard of it

- "Most people haven't."
  "It's not solar and doesn't require retrofits."
- "It cuts electrical spikes and wasted loads, saving the business some serious money."

Soft Ask

- “If you’re open to it, I can have my team review a bill & single line drawing and tell you if it’s worth exploring.”
- “If it’s not a fit, we’ll tell you that too.”

SECTION 9: Your First 5 Days

DAY 1: Learn the Basics

FOCUS

- Read the Optimizer overview in this playbook
- Understand *what* an Optimizer does (manage wasted power, reduce peaks, protect equipment)

ACTION STEP

Write down 3 simple ways Optimizers help:

- Homeowners
- Businesses
- Post one takeaway in the community under #optimizers to start engaging.

DAY 2: Learn the Analogies

FOCUS

Get comfortable explaining Optimizers *without technical jargon*
Practice analogies like:

- “Cruise control for your electricity”
- “Cleaning up power waste behind the scenes”
- “Smoothing spikes that drive bills up”

ACTION STEP

- Rewrite one Optimizer explanation in your own words
- Practice telling your family about it until it feels natural
- Save one analogy to your notes app to use in conversations.

DAY 3: Start Conversations

FOCUS

- Start conversations from curiosity, not selling
- Use simple openers:
    - “Do you rent or own?”
    - “Have you ever looked into solar? Do you have a true-up bill?”
    - “Do you still work at ___?”

ACTION STEP

Reach out to:

- 5 homeowners
- 5 business contacts

The goal is a conversation, not booking yet.

DAY 4: Collect Bills and Info

FOCUS

Learn how to ask for info casually and professionally
Understand what matters:

- Residential: electric bill and usage
- Commercial: who handles utilities, peak demand exposure, single line drawing

ACTION STEPS

Ask for:

- 2 residential electric bills
- 2 commercial contacts or utility decision-maker intros

Send info to your team for review

DAY 5: Book 4 Appointments

GOAL

- 2 Residential appointments
- 2 Commercial appointments

ACTION STEPS

Follow up with:

- “Our team took a look at the information you provided, when is a good time to connect this week?”
- Commercial: "After I get 12 months of data and a single line drawing, I can run the numbers, pull the ROI, and see if it makes sense for you and your business"

Get dates on the calendar.

BONUS TIP
You don’t need to convince anyone.
Your job is to:

- Ask good questions
- Share examples that worked
- Let the numbers tell the story

SECTION 10: Resources

Source of Truth Folder

Visit the Optimizer channel inside our community for questions and learning. See you in there!