The XEN Solar Business Canvas™

An overview of the XEN Solar System for marketing, sales and service for your solar business

Ideal State for Operational Excellence - Customer Lifecycle						
Traffic platforms	**Web site**	**Nurture**	**Sales**	**Delivery**	**Support**	**Evangelists/Advocates**

Paid ads
Lead sites (eg SolarQuotes)
Social
Organic (SEO)
Referrals
TV
Radio
Letterbox
Telemarketing
	Landing pages
	Form submits
	Chatbots
	Meetings
	
	Content
	Knowledge base & FAQs
	
	Custom properties
		Email marketing
		SMS
		Webinars
		
		Remarketing (social, paid ads)
			Deals (pipeline management)
			Proposals
			On-site estimates (iPad)
			Tasks
			
			Deal pipelines:
			● On grid/Off grid
			● Home (Residential)
			● Business (Commercial)
			● Service/repairs
			● Upgrades
				Tickets
				Customer portal
				
				Install docs
					Customer care
					Sales
					   ● Up-sell (bigger system upgrade)
					   ● Cross-sell (batteries, heat pumps)
					Knowledge base
					Surveys
						Loyalty clubs
						Referral programs

Implement and Done-For-You			Implement and Train your team Ongoing optimisation of processes (use our templates - continually updated) New integrations to platforms Monthly insights and reporting analysis - operational excellence reports (eg benchmarking compared to other dealers) The XEN Operational Excellence platform, built on top of HubSpot			
Processes and Automation						
	Automatic insertion into CRM Internal notifications	Automated nurtures ● Prospect emails ● Internal status updates	Pipeline automation ● Tasks ● Required fields ● Contact communication	Ticket automation ● Tasks ● Customer updates	Survey automation	
Integration/Interaction points						
Integration ● Social channels ● Paid ad accounts	Integration ● Google Tag Manager ● Google Analytics ● Tracking pixels (FB, LI)	Integration ● MessageMedia (SMS) ● Webinar (Zoom, GoTo)	Integration ● SolarPlus - Proposal ● OpenSolar - Proposal ● Pylon - Proposal ● MYOB/Xero - Financial ● Payment platforms	Integration ● SolarPlus - Install docs ● OpenSolar - Install docs ● Pylon - Install docs ● ERP (inventory) ● ServiceM8 ● SimPro (Arrowflow) ● Tradify		
Reporting (Attribution)						
Social reach, clicks Ad campaigns ($, clicks) Traffic Calls	Pageviews Sources (attribution) Leads Time on site	Email engagement SMS reports	Revenue Attribution Time to close Lead quality	Time to deliver Customer quality	Customer happiness (NPS)	Customer retention Customer repeat Customer advocacy
HubSpot Hub						
HubSpot Marketing Hub	HubSpot Marketing Hub HubSpot CMS	HubSpot Marketing Hub	HubSpot Sales Hub	HubSpot Service Hub	HubSpot Service Hub	HubSpot Marketing Hub
Desired State (90 days)						

Achieved State (90 days)						
Starting State						
No traffic	Poor web site (slow, no mobile) No tracking	No email No notifications	Leads managed from Inbox Manual proposal	Manual docs	Support managed from Inbox	No after-sale communication