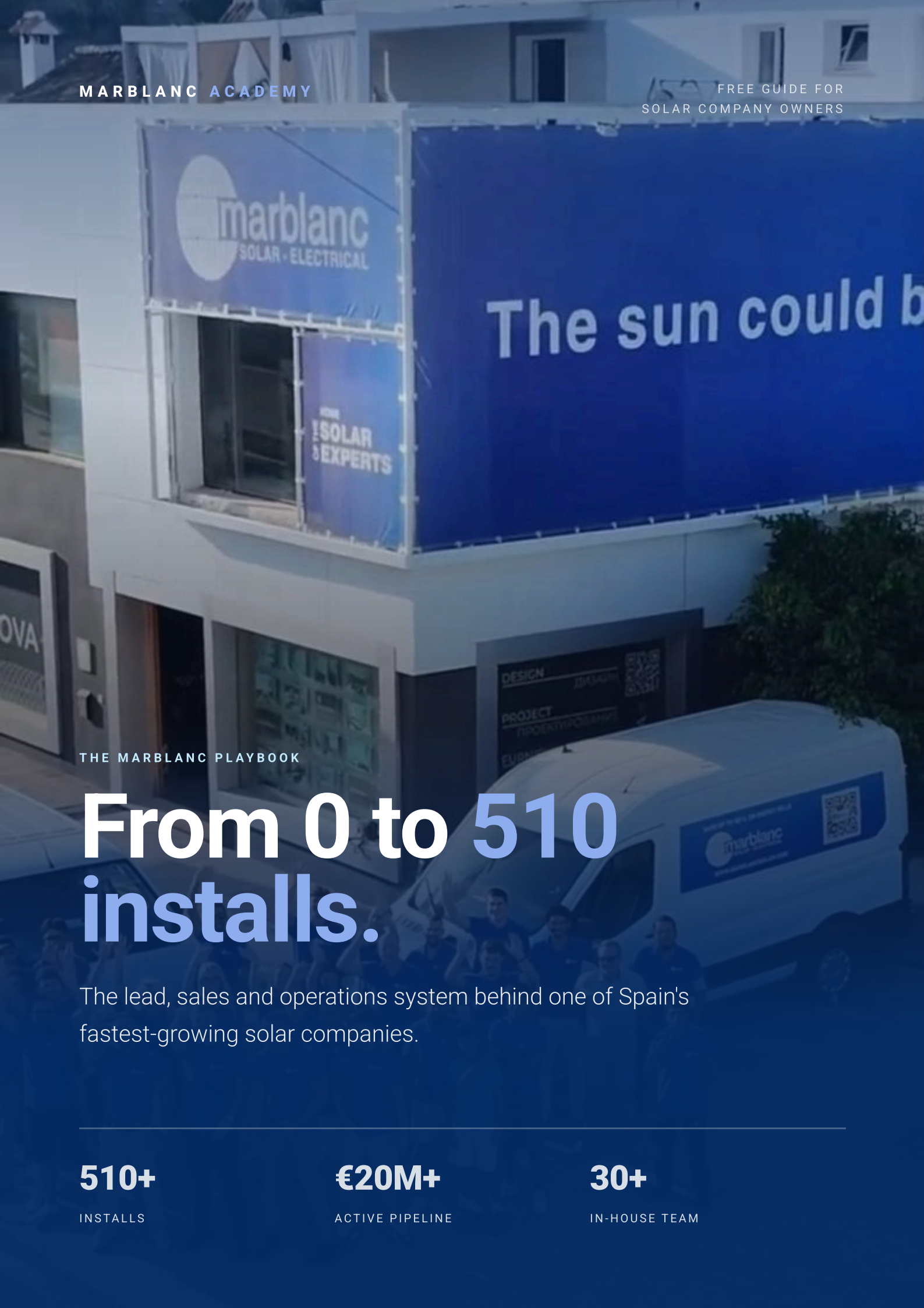


THE MARBLANC PLAYBOOK

From 0 to 510 installs.

The lead, sales and operations system behind one of Spain's fastest-growing solar companies.

510+	€20M+	30+
INSTALLS	ACTIVE PIPELINE	IN-HOUSE TEAM

INTRODUCTION

Most solar companies can sell or install. Few can do both.

We built Marblanc Solar to do both. This playbook is the system behind our numbers: how we generate leads, book appointments, close deals, run installs and keep customers happy, plus the mistakes that cost us most.

510+
INSTALLS COMPLETED

€20M+
ACTIVE PIPELINE

€223K+
INVESTED IN META ADS

46M+
AD VIEWS · 4.3M REACHED

€1.8M+
SAVED ON CUSTOMER BILLS

4.9★
FROM 140 REVIEWS

INSIDE

01 Lead generation
02 Appointment setting
03 The sales process
04 Operations
05 Team structure
06 Our costliest mistakes

WRITTEN BY



Roman Mitchell, CEO & Co-Owner. Leads growth: Meta ads, sales, brand and numbers.



Adam Millington, COO & Co-Owner. Leads operations: install teams, standards, paperwork and aftercare.

Together they mentor solar company owners through Marblanc Academy.

CHAPTER 01 · LEAD GENERATION

01

Give value before you ask.

Our leads come from Meta ads that offer something free and useful, not a hard "get a quote" pitch. People enter their details to get a personalised result, and we get a warm, qualified lead.

OUR FREE CALCULATORS: EACH ONE IS ITS OWN LEAD MAGNET

- Finance & break-even
- Tax incentives
- EV charging
- Holiday rental
- Pool heating
- Property value increase
- Electricity deal checker

HOW WE RUN THE ADS

1. **One campaign per calculator.** You see exactly which offer brings the cheapest, best leads.
2. **Two or three ads inside each campaign.** Let Meta find the winning creative.
3. **Simple copy.** A one-sentence headline and one-sentence primary text. "Free guide" or "130+ verified 5-star reviews" beat clever wordplay.
4. **A recognisable brand character.** Our bull mascot, Blanco, stands out in the feed and builds memory.
5. **Optimise for the real conversion.** Track the completed calculator report, not page visits.
6. **Put budget where you can deliver.** Split spend by region based on your survey capacity in each area.

THE LESSON

A free tool turns cold traffic into people who already know their numbers. Your sales team starts every call with a warm lead.

02

Speed and systems win the booking.

A lead is worth most in the first minutes after it comes in. We have a dedicated team of appointment setters whose only job is to call new leads and book them in.

OUR BOOKING SYSTEM

1. Every surveyor and closer has their own online diary for each appointment type: in-person survey, digital presentation, battery survey.
2. Setters book straight into the right person's diary.
3. Every booking flows automatically into a shared sheet and our CRM, matched to the original lead.
4. The customer gets an automatic confirmation email from their rep.
5. Setters post a running weekly survey count in the team chat, so everyone sees the numbers daily.

RULES THAT MAKE IT WORK

- **Separate setting from selling.** Setters book, surveyors survey, closers close. Each person gets great at one thing.
- **Pay setters on results.** Reward booked surveys that actually happen, with a bonus for a weekly target. Cancellations don't count.
- **The whole team sees every live lead.** Ownership shows responsibility, but follow-ups sit in a shared queue so nothing waits on one person.
- **Offer in-person and digital.** Digital surveys let you sell where you don't yet have a surveyor on the ground.

> "If a lead waits until tomorrow, someone else has already booked them today."
>
> ROMAN MITCHELL, CEO

03

One clear path to a signature.

Every customer follows the same eight steps. When a deal stalls, you can see exactly where.

01
Lead
From a Meta ad or calculator

02
Appointment
Booked by a setter

03
Survey
Roof and bill, in person or digital

04
Design & quote
Built in solar design software

05
Presentation
Delivered by a closer

06
Signature
The customer commits

07
Deposit
Secures the install date

08
Install
Then final payment

WHAT MAKES IT CLOSE

- **Standardise the survey.** Surveyors fill in the same digital form every time, so every quote is built from complete, consistent data.
- **Automate the paperwork.** Survey submissions and electricity bills feed straight into the design software. Less admin means faster quotes.
- **Sell with the customer's own numbers.** Their calculator result, their bill and their roof make the case for you.
- **Lead with proof.** Reviews, installs nearby and real savings figures do more than any pitch.
- **Keep pricing and design approvals with the owner** until your team has proven it can protect margin.

CHAPTER 04 · OPERATIONS, WITH ADAM

Deliver what sales promised.



Sales growth only works if installs keep up. Growth without delivery creates angry customers and bad reviews, and bad reviews kill your ads.

INSTALL SCHEDULING

One project manager owns the install calendar. Every signed deal gets a date quickly, so customers don't go cold after paying a deposit.

INSTALL TEAMS

In-house crews with clear standards, so quality doesn't depend on who turns up.

QUALITY & PAPERWORK

The same checklist on every job. Photos, certificates and handover documents are done before the team leaves.

AFTERCARE

A named customer care person handles every question after install, and every client has a direct group chat with the company.

REVIEWS

Ask every happy customer for a review at handover. Our 140 reviews at 4.9 stars now go straight into our ads.

VALUE AFTER THE SALE

Free electricity bill swaps: our customer care team moves customers to a better tariff. It keeps us in touch and brings referrals.

> "Most solar companies are strong at either selling or installing. We built both, because one without the other doesn't last."
>
> ADAM MILLINGTON, COO

CHAPTER 05 · TEAM STRUCTURE

05

Give every role one job.



The owner can't be the setter, surveyor, closer and project manager forever. This is how we split the work.

ROLE	OWNS	MEASURED ON
Owners (CEO & COO)	Growth, operations, pricing, key decisions	Turnover, profit, cash
Appointment setters	Calling leads and booking surveys	Surveys that actually happen
Surveyors	Roof and bill surveys, the survey form	Complete, accurate surveys
Closers	Presentations and signatures	Close rate, deal value
Project manager	The install calendar and crews	Install speed and quality
Customer care	Aftercare, bill swaps, reviews	Reviews and referrals
Commercial sales	Business and hotel projects	Commercial pipeline

Run every team from its own workspace. Each department gets its own AI assistant workspace with its processes, scripts and data: appointments, sales, surveys, installs, marketing, finance, aftercare, recruitment and automations. New staff get up to speed faster, and the owner answers fewer repeat questions.

CHAPTER 06 · LESSONS

06

The mistakes that cost us most.

Every one of these slowed us down. Fix them before they cap your growth.

1 **Running the business from WhatsApp.**

Bookings, updates and leads spread across chats get lost. Put every lead and booking in one system the whole team can see.

2 **Letting the business depend on one person.**

When a key surveyor or closer leaves, their diary and leads shouldn't leave with them. Leads belong to the team, not the rep.

3 **Doing data entry by hand.**

Every manual copy-and-paste between forms, sheets and software is slow and causes mistakes. Automate the hand-offs first.

4 **Selling faster than you can install.**

Growth operations can't deliver turns into delays, refunds and bad reviews.

5 **The owner doing everything.**

If every decision runs through you, you are the ceiling on growth. Build roles, processes and dashboards so the business runs without you in the middle.

MARBLANC ACADEMY

Want us to build this with you?

12 weeks of 1:1 mentorship with the founders of Marblanc Solar, for solar company owners who are already installing and want to grow.

Weekly calls

With Roman and Adam, working on your biggest blocker first.

WhatsApp access

Questions answered between calls, not a week later.

Our systems

The processes, templates and setups from this playbook.



Roman Mitchell

CEO · GROWTH

Leads, Meta ads, sales, brand and numbers.



Adam Millington

COO · OPERATIONS

Install scheduling, crews, quality, paperwork and aftercare.

DM "SOLAR" to apply.

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Places are limited