

SUNRUN

WELCOME

to

SUNRUN

RIGHT PRODUCT
RIGHT PLACE
RIGHT TIME



RIGHT PRODUCT
RIGHT PLACE
RIGHT TIME

SUNRUN

CHANGE

*Chief Experience
Officer*

ALLRED



RIGHT PRODUCT
RIGHT PLACE
RIGHT TIME

SUNRUN

PAUL

*Chief Revenue
Officer*

DICKSON



RIGHT PRODUCT
RIGHT PLACE
RIGHT TIME

SUNRUN

CHRIS

*Chief Field
Operations
Officer*

MOGELLELLAN



RIGHT PRODUCT
RIGHT PLACE
RIGHT TIME

SUNRUN

HEIDI

*VP of
Customer Experience*

HEAVEN



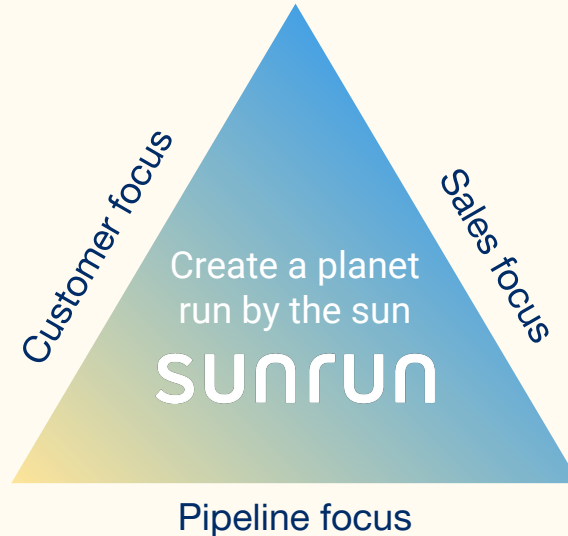
CUSTOMER EXPERIENCE (CX) ORGANIZATION

ORG MISSION: Come together to establish an excellent customer experience from the moment we meet a prospective customer through the last kilowatt-hour we provide them.

WHO WE SERVE

In the CX Org, our work focuses on three key customers. They're success is key to assuring the best customer experience:

1. The Customer
2. Our Sales Teams
3. Operations



HOW WE DO IT

- Respond to outreach (internal and external)
- Keep track of our pipelines and collaborate with others when things get stuck
- *Do all the above with speed, kindness, and consideration!*



Heidi Heck

Vice President
Customer Operations

Design & Engineering
1,284 Employees

Rebates & Interconnection
163 Employees

Sales & Project Operations
377 Employees

Retention
40 Employees

Nik Vassios
Sr. Director



Alex Blom
Director



Karly Smith
Sr. Director



Lauren Gularte
Manager



Site Modeling
Design & Planset generation
Professional Engineering

Rebates & Interconnection
Submission & Approvals
Utility/Incentive Research
SREC/PBI Realization

Sales Support
Sales Licensing/Compliance &
Housing
Backend milestone processes
Contract Review & Verification call

Retention of At-Risk customers
Site audit fall off

Sales Enablement Functions

Sales Support Desk



M-Sat | 7am - 10pm MST
Sun | 7am - 8pm MST

Live Sales Support

- Provides live rep support in home. Including troubleshooting, policy support & process support.
- Handles 40,000+ sales rep requests per month.

Contract Review



M-Sat | 7am - 10pm MST
Sun | 7am - 8pm MST

Contract Approval

- Ensures the contract has all the funding requirements to reach Sunrun Approved
- Provides assistance with missing documentation & Pending approvals.

Verification Call



Sun-Sat | 4AM - 1AM MST

Verification Call

- Completes the verification call with the customer, confirming contract terms, customer info, etc.
- Piloting our VC bot this week, full roll out anticipated by Mid-Feb.

Sales Licensing & Compliance



M-Fri | 7am - 5:30pm MST

Licensing & Housing Facilitation

- Facilitates and maintains HIS, Solicitors and Telemarketing licensing.
- Coordinates housing for Fusion.

Design & Engineering Functions

Site Modeling

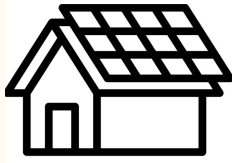


Sun-Sat | 24 hours

Site Modeling

- Generates accurate and fast site models for proposal generation

Customer Design



Customer Design

- Utilizes site survey information to generate a final design (CAP) for the customer.
- Identify necessary home upgrades

Permit Design



Permit Design

- Generates permit, utility, and installation deliverables.

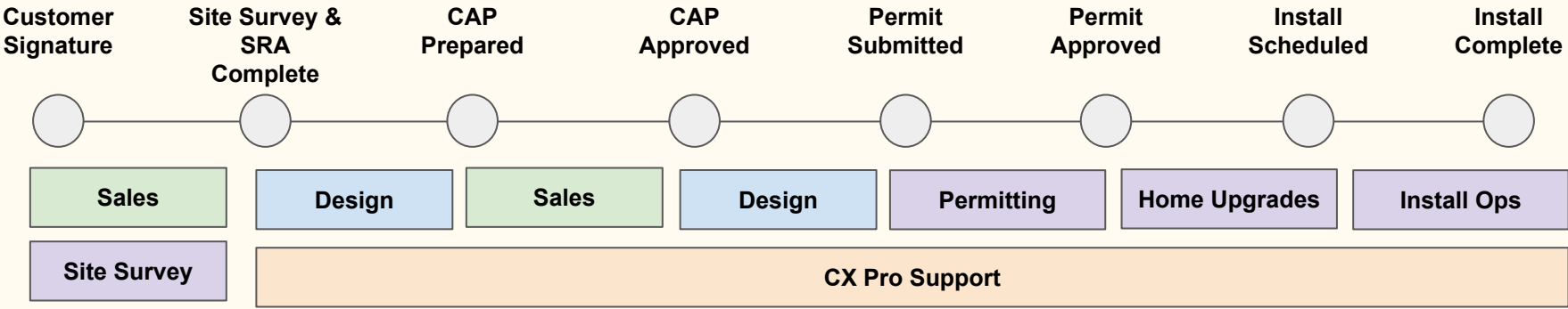
Professional Engineering



Professional Engineering

- Ensure the design meets local requirements and meets industry standards.
- Completes Engineering stamps

Customer Journey Sale - Install



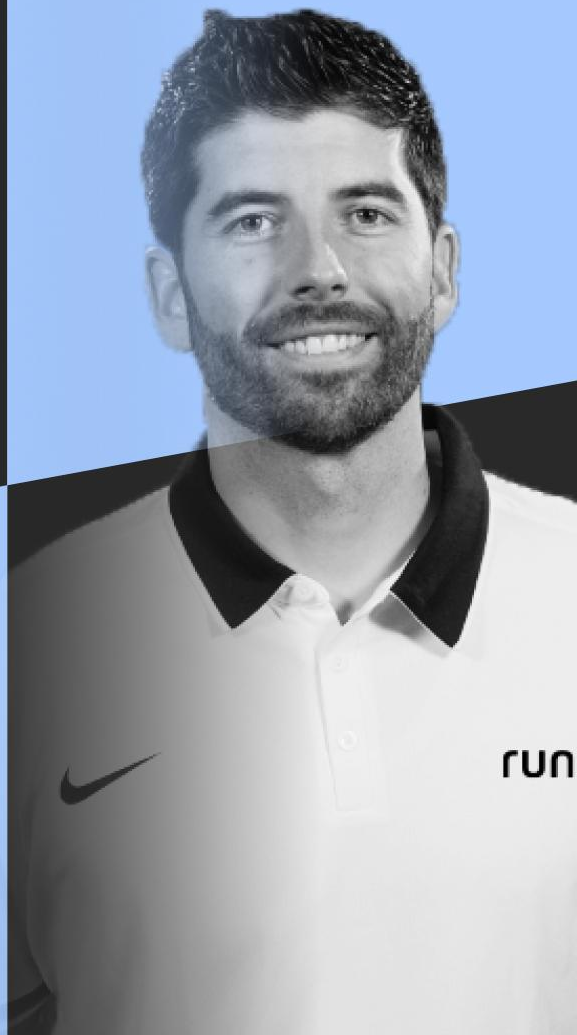
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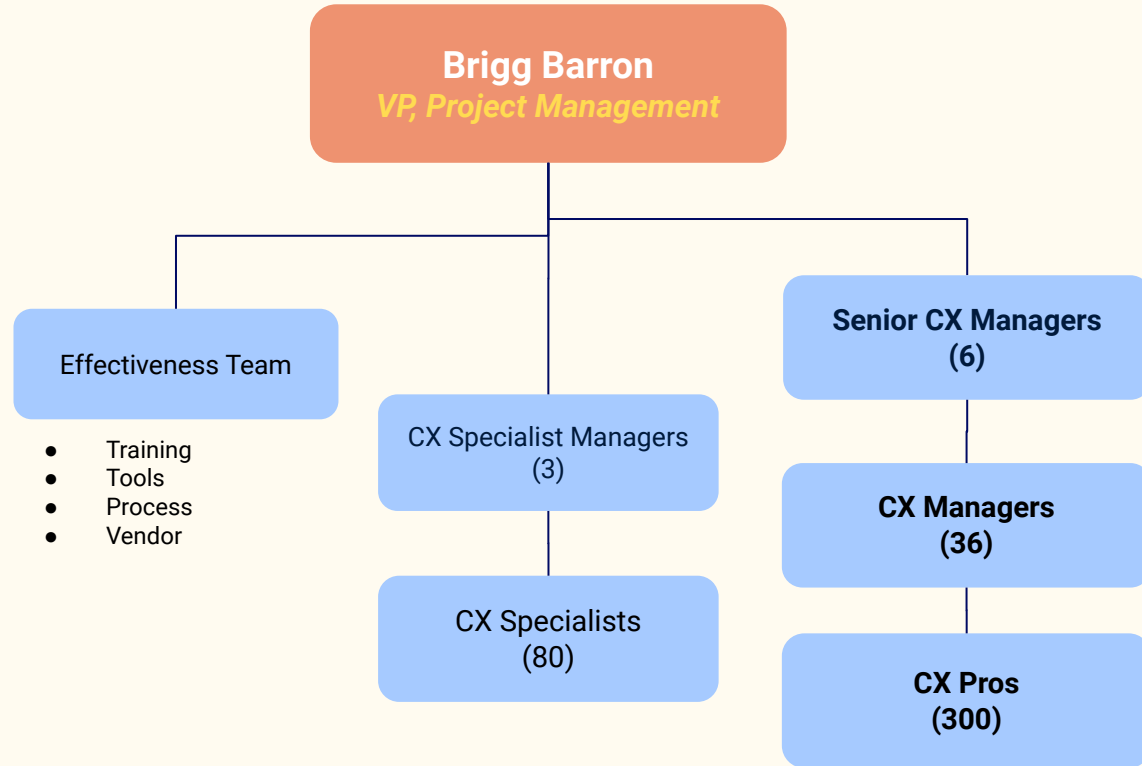
SUNRUN

BRIGG

*VP of CX
Management*

BARRON





- Sales Reps work in tandem with the Customer Experience Professional (CX Pro).
- The CX Pro reports to the Customer Experience Manager (CXM).
- The CXM reports to the Senior Customer Experience Manager (Sr. CXM).
- CX Pros, CXMs, and Senior CXMs are typically assigned by sales channel and geography.

Focus on Customer and Sales Experience

Focus on Efficiency and Fulfillment

Where We Focus

Project Life Cycle Ownership

CX Pro Org owns
projects from **SRA**
to **Activation**

What exactly does that mean?

AT SRA: CX Pro org is assigned to projects at SRA, at which time they will start by supporting Sales in the background.

- Sales Support & Design prepares CAP package for Sales
- Sales works with customer to obtain & close CAP

AT CAP: Once the CAP is closed, the CX Pro org will then engage with the customer directly, beginning with an Introduction Call.

AT ACTIVATION: CX Pro org will manage the bulk of project movement, and along with the sales rep, be the customer's primary contact through Activation, finalizing with an Activation call with customer and confirming system production.

SRA (Sunrun approval) = official Sunrun approval of customer's completed contract

CAP (customer-approved plans) = official customer approval of system design for installation

Activation = when customer's system is turned on and confirmed to produce

Division of Ownership

Special focus depending on the specific role in the CX Pro Org.

CX PRO project manager

lead systems over the finish line, combining expert business knowledge and cross-functional efforts.

Two key customers are our traditional customers and sales reps..

CX SPECIALIST project support

Provide phone line support when CX Pros don't answer.

Assist with select CX queue tasks.

Three key customers are our traditional customers, Sales, AND the CX Pro.

Key Responsibilities

cx pro

Intro Call

Introduce customers to Sunrun and becoming their main point of contact with the customer after CAP.

Assist Scheduling Teams

Work with customers and crews schedules to schedule install and prepare customer.

Activation Call

Guide customer through activating their system, and managing resolution as needed.

Pre-CAP Activities

CAP troubleshooting and potential redesign assistance..

Pipeline Management over Task Management

CX Pros can primarily drive pipeline movement and management working cross functionally with the other departments.

Key Responsibilities

cx specialist

CX Specialist supports the **CX Pro** by backing up the phones and assisting with certain standard tasks

Rollover Calls

If a CX Pro is not available to answer a customer call, a CX Specialist will answer and assist the customer

Specific Queue-based Tasks (as assigned)

Some examples include:

- Signature and document collection tasks
- Dig Alert

Rewards & Progression

- CX Pros are incentivized with commissions...like sales reps.
- CX Pros compete in *The League* with their metrics...like reps.
- Through quality and quantity CX Pros can achieve new levels/titles that positively impact their pay base pay rates.
- Difficult projects pay CX Pros more \$ per project, so they are aligned to push hard projects through the pipeline.

CX Agent Progression

CX Pros are assigned to sales channel first & then by region.
Additional progress pathway – leadership, VIP account specialist, advanced escalation team



Sr CX Pro (2 Level Progression Path)

- Same core job functions as CX Pro
- Expert at complex issue resolution
- Handles customer & sales rep escalations
- High volume project completion
- Ability to solicit referrals
- Discretion to reward customers with store credits

\$\$\$ Earn commission off referrals \$\$\$



\$\$\$ Earn commission off referrals \$\$\$

CX Pro (3 Level Progression Path)

- Partner with the sales rep to provide the customer a great customer experience. Expedite the account to install & activation
- Pipeline management SRA - Activation (future state solarversary)
- Provide positive project updates to customers weekly
- Proactive outbound resolution
- Rep & customer inbound resolution
- Missing document collection
- Inventory changes
- HOA approvals
- Coordinating with internal teams to progress accounts
- Installation scheduling
- SOW
- As-built change orders



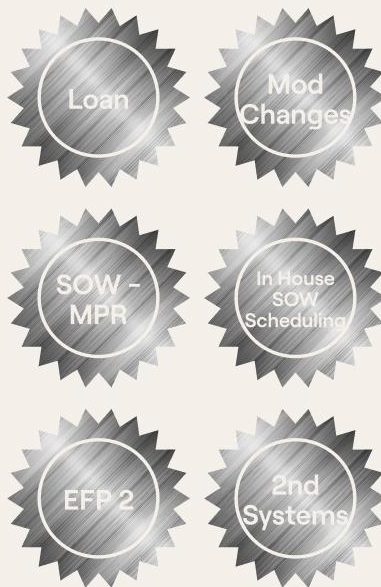
CX Specialist

- Inbound contact center. Handles all roll-over calls from CX Pro team.
- Expert at reading the project notes & project navigation.
- Queue based pipeline management tasks

*Future state

Badges

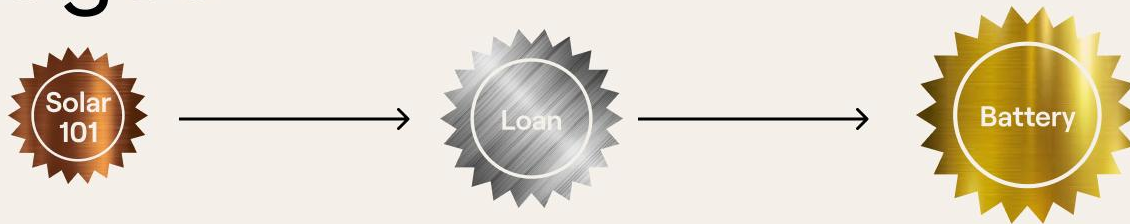
CX Pros can earn badges during their career progression, which show a proficiency in various project types.



**Badges can be revoked if proficiency is lost*

Earning Badges

CX Pros can earn badges during their career progression, which show a proficiency in various project types.



Training

Training is completed by logging into the LMS training site and completing the necessary learning and testing for each badge certificate.

Proficiency

Proficiency is earned through volume of jobs in that category, hence, proof of concept. For example, if a CX Pro has completed training for the "Loan" badge, you would be required to have loan accounts progress through the pipeline to activation.

****Badges can be revoked if proficiency is lost***

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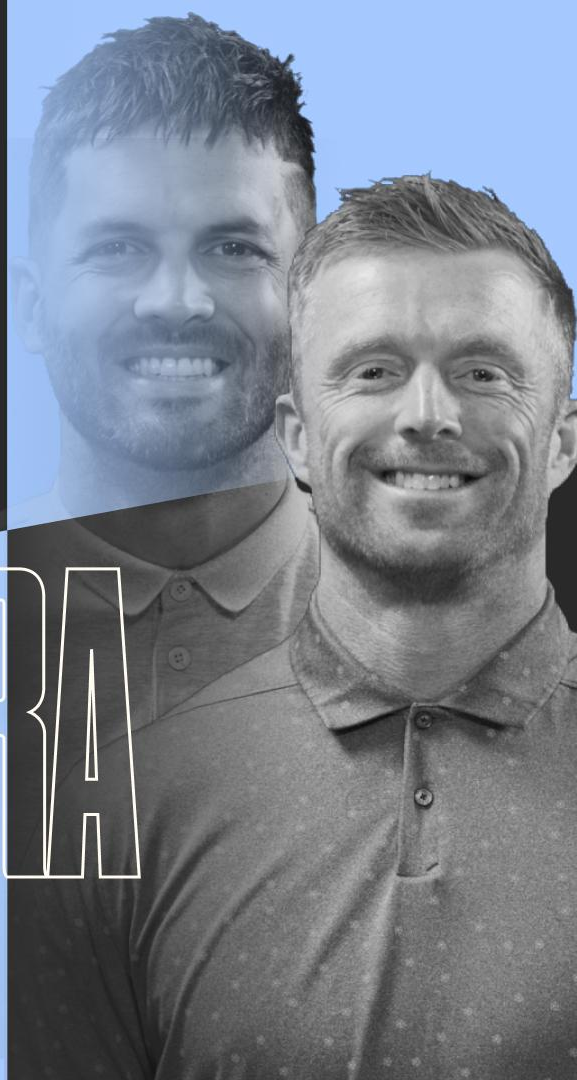
SUNRUN

*Sr Director of
Sales Experience*

BRAD KRAMER

JASON DEELSTRA

*Sr VP of Marketing &
Employee Experience*



YOUR SALES EXPERIENCE

Onboarding

Training

Tools & Resources

Motivation

Experiences

Leadership Dev

Communication

TRAINING

OUR ONBOARDING PROCESS INTRODUCES NEW EMPLOYEES TO OUR COMPANY, CULTURE, AND CUSTOMER OBSESSED APPROACH.

FOR CURRENT EMPLOYEES, REGARDLESS OF TENURE, WE PROVIDE EDUCATION TO ENABLE GROWTH AND DEVELOPMENT AT SUNRUN.

- + Welcome to Sunrun
- + Online learning
- + Playbook
- + On demand resources
- + Micro-videos →



RESOURCES

You'll be equipped with all the resources you'll need to be successful.

Traditional Power

To provide power, traditional power plants have costs that are significantly higher than solar.

Home Batteries

Home batteries store excess solar power for use when the sun isn't shining, so you can maximize your power throughout the day.

What's Next?

- 01. Generation**
Power plants generate electricity by burning coal, natural gas, and oil.
- 02. Distribution**
The energy passes through a network of power lines to reach your home.
- 03. Proposal**
We'll customize a solar energy system to fit your needs.
- 04. Site Survey**
Our technicians will survey your home to ensure it can support solar.
- 05. Project Review**
We'll review your custom system design, verify final details, and provide an estimated timeline.
- 06. Permitting**
We'll submit your project details to your city for review.
- 07. Installation**
Once your permit is granted, we'll schedule the installation.
- 08. Inspections**
The city and utility will do a final inspection to confirm the system was installed to local codes.
- 09. Power On**
After final approval, you can flip the switch and enjoy all the benefits of going solar.

Our advanced home batteries store excess solar power for use when the sun isn't shining, so you can maximize your power throughout the day.

Trust the experts

We're talking about your home's most important place in the world. Don't take a chance on a company without the experience and expertise of Sunrun's solar experts in California to do the job right.

Where does your power come from?

Find out whether you can save when you go solar.

Christopher O'Shaughnessy
888-888-8888

sunrun

I'm your Sunrun Solar Guide.

sunrun

The background of the image shows a group of people in a meeting or collaborative work environment. On the left, a person is seen in profile, looking towards the center. In the center, another person is partially visible, and on the right, a third person is looking towards the center. The scene is dimly lit, with a warm yellow glow on the left side and a cooler blue-grey tone on the right. The overall atmosphere is professional and focused.

Work Hard.
Play Hard.

SUNRUN

COMB

COMBINE

For any **Fusion Expert** who is hired on 01/01/24 or later



MILE

MILESTONES

STO

NES

1 Polo
(Male/Female styles available for all shirts)



1 SRA

+1 Polo & hat



4 SRA

+1 Polo & LS Shirt



8 SRA

+1 Polo, 1 hat & 1 Jacket



1 CAP

+1 Bag



4 CAP

FOR FUSION EXPERTS

Milestones must be hit in first **120 days** in order to qualify.

12 CAP = 2
Tickets to yearly
Combine Trip



14 CAP = VP dinner on Combine Trip

16 CAP = Paid excursion on Combine Trip

Combine reps will also earn bonus **League Store credits** based on the speed of completing the final milestone:

75 DAYS | **\$300**

90 DAYS | **\$200**

120 DAYS | **\$100**

THE FINE PRINT

(1) Styles & colors may vary for each item; (2) Combine is triggered by any sales activity; (3) Trip is non-transferable, cannot be cashed out, nor deferred to later years.

COMB

COMBINE

For any **Fusion Athlete** who is **hired** on 01/01/24 or later



MILE

MILESTONES

STO

NES

1 Polo
(Male/Female
styles available
for all shirts)



1 SRA

+1 Polo & hat



4 SRA

+1 Polo & LS
Shirt



8 SRA

+1 Polo, 1 hat
& 1 Jacket



1 CAP

+1 Bag



4 CAP

FOR FUSION ATHLETES

Milestones must be hit in first
120 days in order to qualify.

16 SRA + 8 CAP = 2
Tickets to yearly
Combine Trip



10 CAP = VP dinner on Combine Trip

12 CAP = Paid excursion on Combine Trip

Combine reps will also earn bonus
League Store credits based on the
speed of completing the final milestone:

75 DAYS | \$300

90 DAYS | \$200

120 DAYS | \$100

THE FINE PRINT

(1) Styles & colors may vary for each item; (2) Combine is triggered by any sales activity; (3) Trip is non-transferable, cannot be cashed out, nor deferred to later years.

MOTIVATION

Based on your quarterly production, you achieve 1 of 6 League Levels. These levels provide various rewards. The more you produce, the more you earn.




<5 INSTALLS

CLUB



4 INSTALLS

1 DIAMOND



8 INSTALLS

2 DIAMOND



12 INSTALLS


3 DIAMOND



16 INSTALLS

4 DIAMOND

EARN EQUITY ↗




<5 INSTALLS

CLUB




5 INSTALLS

LETTERMAN



10 INSTALLS

STARTER




15 INSTALLS

ALL-STAR



20 INSTALLS

ALL-AMERICAN



25 INSTALLS

FRANCHISE

THE RUNX STORE

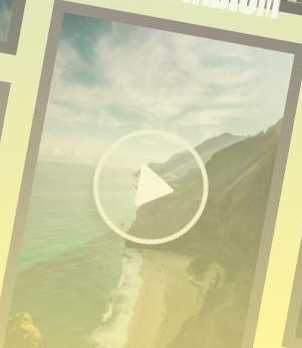
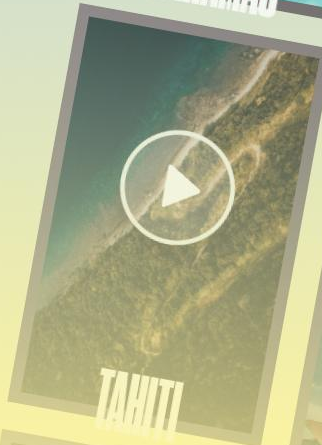
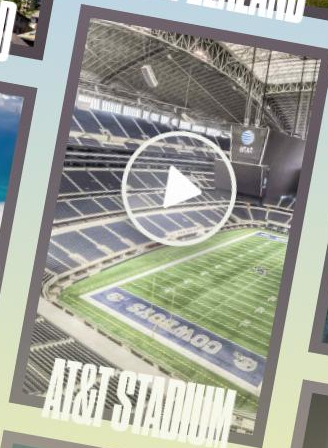
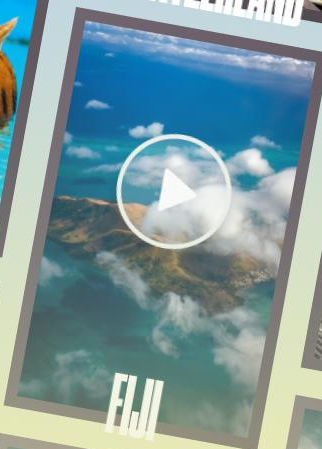
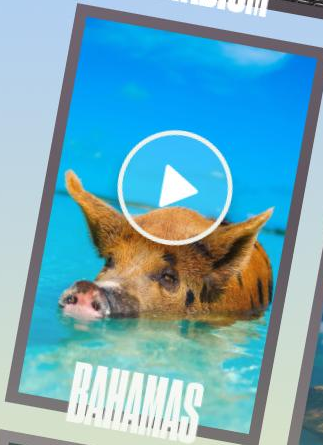
SHOP RUNX

Explore a curated collection of premium, exclusive brands like Nike, Carhartt, lululemon, and more. Stay ahead of the style curve with quarterly new releases that keep your wardrobe fresh and exciting. Store credits can be earned throughout the year by participating in various competition and incentives. *New mobile app coming soon!



EXPERIENCES

We work hard, and we play hard. Check out some of the places our top producers have travelled.



Delivering Results

Manager Playbook Tiled

LEADERSHIP
PRINCIPLES

BUILDING
LEADERS
WHO BUILD
LEADERS



Leadership Principles

Build Your Team

Inspire Your Team

Perform

● Home

Leadership Principles

- Put people first
- Build the best team
- Lead visibly, lead credibly
- Communicate clear and often
- Be the culture
- Empower others to empower others
- Creates confidence in your core
- Set goals, keep score
- Take safety seriously
- Win

Put people first

We LOVE people. It's a core value. This means in all decision-making we have to ask ourselves first for the decision-making and change management process.

Part 1: Why we love people

Part 2: People first decision making

Part 3: People driven performance

Part 4: Avoid mis...

● Home

Build Your Team

Build your culture

"Culture exists strongly for Sunrun" - a team with a great culture is a team that makes their work, understands what's going on, and makes each other better. One who flows fast for building culture and explore the additional resources to drive change.

Establish culture starting with the in interview

Set the tone early and often

Recruit

Interview & Hire

Onboarding

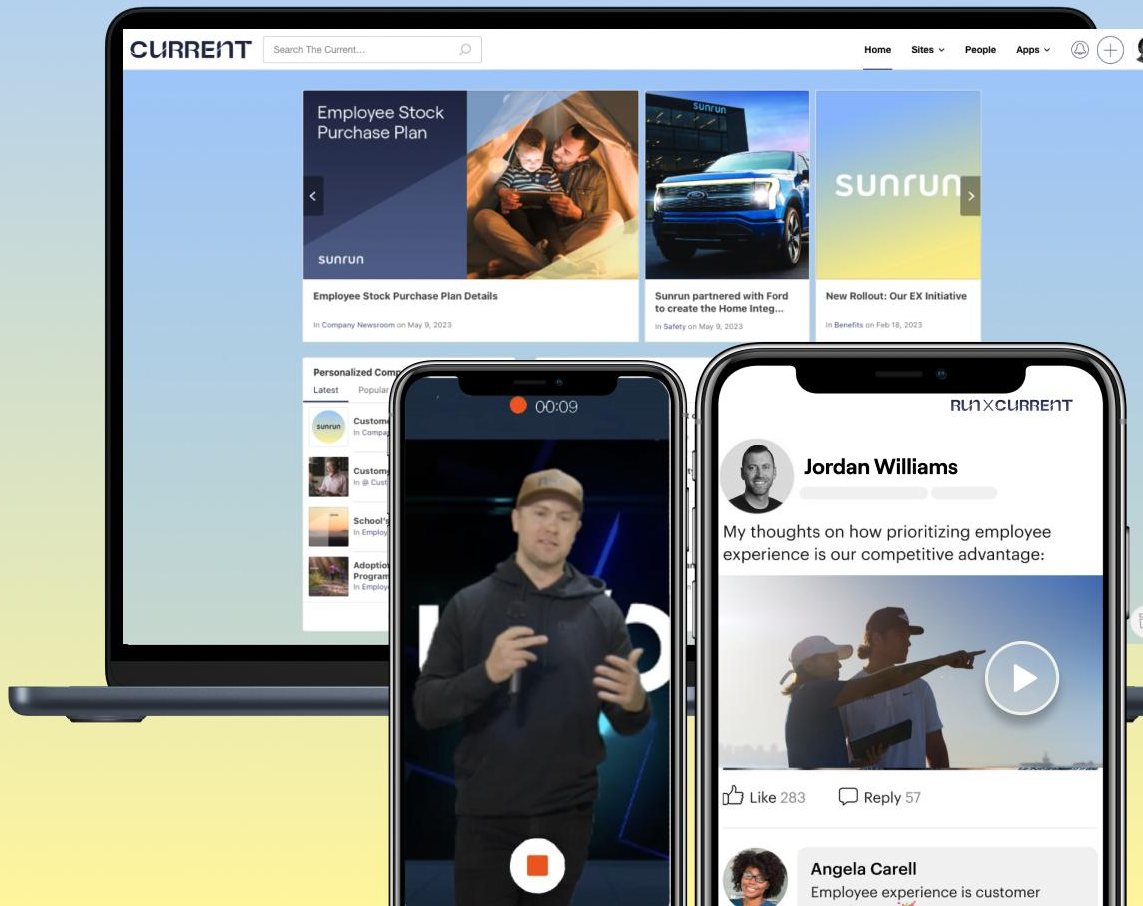
Be the Culture

Train New Hires

Resources

COMMS

Using multiple different platforms, you'll always be in the know.



RIGHT PRODUCT
RIGHT PLACE
RIGHT TIME

SUNRUN

PARKER

*VP of Revenue
Strategy &
Analytics*

STEPHENS

