RESOURCE HUB | THE ENERGY ACADEMY

Solar Lead Qualification Checklist

69 items across 9 sections.

PROJECT

LOCATION

PREPARED BY

DATE

Tick each item when it is verified. Write N/A where an item does not apply to your project, and use the right-hand column for notes, owner and due date.

1 Contact, Authority, and Entity

NOTES / OWNER / DUE

Start with who you are actually dealing with, because every other answer depends on it. The person who takes the first meeting is frequently not the person who can commit the organization, and the organization in the conversation is frequently not the legal entity that would sign.

☐	1.1 Record the full legal name of the entity that would sign the agreement, not the trade name	
☐	1.2 Confirm whether that entity is a parent, a subsidiary, or a single-purpose entity	
☐	1.3 Identify by name the individual with authority to sign a long-term energy agreement	
☐	1.4 Ask your contact to describe the internal approval path and who sits on it	
☐	1.5 Confirm whether board, committee, or parent-company approval is required	
☐	1.6 Establish whether a competitive procurement process is required for this buyer	

2 The Utility Account and Rate

NOTES / OWNER / DUE

The bill is the single most informative document a prospect can give you, and the rate structure behind it determines whether solar produces meaningful savings at all. Collect it early and read the tariff rather than the summary line.

☐	2.1 Obtain twelve consecutive months of bills, all pages, for every meter serving the site	
☐	2.2 Record the utility and the exact rate schedule name for each account	
☐	2.3 Pull the published tariff for that rate schedule and confirm it is current	
☐	2.4 Identify whether the bill includes demand charges and how demand is measured	
☐	2.5 Separate delivery, supply, riders, and fixed customer charges in your analysis	
☐	2.6 Confirm whether the customer buys supply from a competitive retailer and on what term	
☐	2.7 Check for any minimum bill, ratchet, or standby charge provisions	
☐	2.8 Confirm whether the account is eligible for the net metering or export program you intend to use	
☐	2.9 Check whether the program has a capacity cap and whether it is currently open	
☐	2.10 Verify there are no separately metered accounts at the site that change which load can be served	

3 Load and Usage Profile

NOTES / OWNER / DUE

Annual consumption alone will mislead you. What matters is when the load occurs relative to production, because self-consumed energy and exported energy are usually worth very different amounts.

☐	3.1	Request interval data from the utility or the customer, at hourly resolution or better	
☐	3.2	Identify the months and hours in which the billing peak occurs	
☐	3.3	Confirm the facility's operating schedule, including shifts, weekends, and seasonal shutdowns	
☐	3.4	Ask about electrification plans, added process equipment, or EV charging under consideration	
☐	3.5	Estimate the share of production that would be consumed on site versus exported	
☐	3.6	Flag whether demand charge reduction is plausible given when the peak occurs	

4 The Site

NOTES / OWNER / DUE

Physical qualification decides whether the project can be built at all. Most of it can be done from imagery, documents, and a short conversation before anyone travels.

☐	4.1	Confirm the roof age, membrane type, and remaining expected service life	
☐	4.2	Identify the roof warranty holder and whether the warranty is still in force	
☐	4.3	Confirm the warranty holder's position on attachments and approved attachment methods	
☐	4.4	Obtain structural drawings or confirm that a structural assessment will be required	
☐	4.5	Map rooftop equipment, skylights, drains, and required clearances	
☐	4.6	Assess shading from adjacent buildings, trees, parapets, and mechanical units	
☐	4.7	For ground sites, confirm acreage, slope, soil conditions, and access	
☐	4.8	For ground sites, check wetlands, floodplain, easements, and recorded restrictions	
☐	4.9	Confirm the zoning classification and whether solar is a permitted use at that parcel	
☐	4.10	Identify the route and distance from the array location to the point of interconnection	
☐	4.11	Note any known environmental or hazardous materials conditions at the property	

5 Electrical Service and Interconnection

NOTES / OWNER / DUE

Interconnection cost and timing kill more otherwise attractive commercial projects than any other single factor, and the answers are rarely available from the customer. Screen for them before pricing anything.

☐	5.1	Record the service voltage, phase, and main service rating at the point of interconnection	
☐	5.2	Photograph or document the existing switchgear, main breaker, and available spare capacity	
☐	5.3	Determine whether a line-side or load-side connection is contemplated	
☐	5.4	Identify the applicable interconnection process and the expected study path for this size	

5 Electrical Service and Interconnection

			NOTES / OWNER / DUE
☐	5.5	Check published hosting capacity or circuit information for the area as a screen, not an answer	
☐	5.6	Estimate the current interconnection queue timing in that utility territory	
☐	5.7	Identify whether utility-side upgrades are likely and who would bear the cost	

6 Property Rights and Site Control

Solar agreements run for many years and they attach to real property. If the customer does not control the property for the full term, someone else is a party to the deal whether they know it yet or not.

			NOTES / OWNER / DUE
☐	6.1	Confirm whether the customer owns or leases the property	
☐	6.2	If leased, record the remaining lease term and any renewal options	
☐	6.3	Identify the landlord and whether landlord consent will be required	
☐	6.4	Determine whether a mortgage or other lien exists that would require lender consent	
☐	6.5	Check for existing rooftop agreements such as telecom antennas or equipment leases	
☐	6.6	Confirm access rights for construction, maintenance, and eventual removal	
☐	6.7	Identify any pending sale, refinancing, or redevelopment plan for the property	

7 Financial Fit and Credit

The ownership structure that fits depends on the customer's capital position, tax position, and creditworthiness. Establishing this early prevents you from modeling an option the customer cannot use.

			NOTES / OWNER / DUE
☐	7.1	Determine whether the customer is tax-exempt or has tax appetite to use benefits directly	
☐	7.2	Establish whether capital is available for direct purchase, or whether third-party ownership is required	
☐	7.3	Ask whether audited financial statements can be shared under confidentiality	
☐	7.4	Confirm whether the signing entity has a parent that could provide a guaranty	
☐	7.5	Ask whether the customer has previously posted a letter of credit or deposit for a comparable obligation	
☐	7.6	Check whether existing debt covenants restrict new long-term obligations	
☐	7.7	Identify the maximum contract term the customer will consider	

8 Motivation, Timeline, and Competition

A customer with no deadline has no project. Anchor the timeline to events that exist on a calendar rather than to stated intentions.

			NOTES / OWNER / DUE
☐	8.1	State the customer's primary driver in one sentence: cost, price stability, sustainability reporting, or resilience	
☐	8.2	Identify any published commitment or target date the project would serve	
☐	8.3	Record the fiscal year boundary and the budget cycle that applies	

8	Motivation, Timeline, and Competition	NOTES / OWNER / DUE
☐ 8.4	Identify fixed dates that constrain the schedule, such as a roof replacement or a lease renewal	
☐ 8.5	Confirm whether an incentive or program window applies and when it closes	
☐ 8.6	Determine how many other developers are engaged and at what stage	
☐ 8.7	Agree on a specific next step with a date and a named owner on both sides	

9	Early Disqualifiers	NOTES / OWNER / DUE

These are the findings that should end a pursuit rather than trigger more analysis. Write down at the outset which of them apply to this deal, so the decision is made while you are still objective.

☐ 9.1	Roof requires replacement within a few years and the customer will not sequence around it	
☐ 9.2	Lease term is materially shorter than the proposed contract term with no extension available	
☐ 9.3	Landlord or mortgage consent is unobtainable	
☐ 9.4	The applicable export or net metering program is closed or fully subscribed	
☐ 9.5	Interconnection upgrades are indicated at a scale the project cannot absorb	
☐ 9.6	The site is below your minimum viable size once usable area is netted out	
☐ 9.7	No identified individual has authority to sign for the required term	
☐ 9.8	The customer will not share bills or financial information at all	

+ Additional Qualification Notes

	NOTES / OWNER / DUE
Items found that are not covered above.	
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SIGN-OFF

PREPARED BY

SIGNATURE AND DATE

REVIEWED BY

SIGNATURE AND DATE

This checklist is a structure for making sure nothing obvious is missed. It does not replace the judgment of qualified professionals, the governing documents or the advice of counsel, engineers and other advisors.